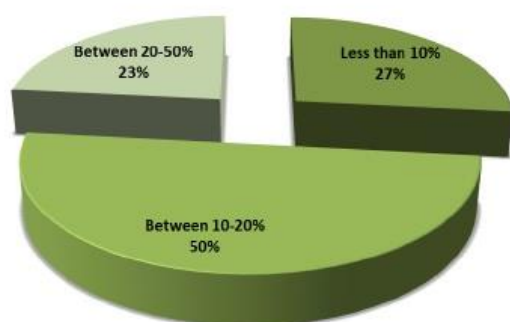


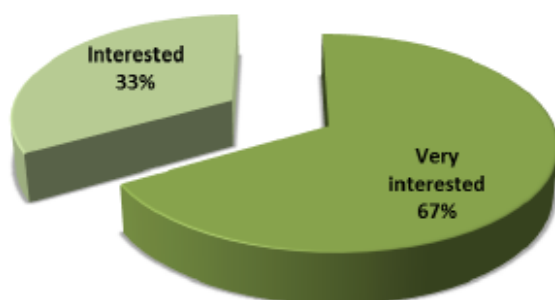
# Key stakeholders survey

Graphic 5. Increase in the offer of tourist facilities thanks to the existence of the greenway



- Greeways Managers.
- UNESCO Heritage sites Managers.
- Tourism providers.  
SME's around Greenways.

Graphic 11. Interest of UNESCO Heritage sites' visitors in using the Greenway



[www.greenwaysheritage.org](http://www.greenwaysheritage.org)

This document is part of the [Greenways Heritage](#) project, co-funded by the EU COSME programme. Presented in a basic working edition, in PDF format, the document has been prepared by the project partner responsible for the deliverable for the purpose of communicating the project results to a broader audience. Your efforts to ensure the maximum dissemination of the document are therefore greatly appreciated.

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Acronym GREENWAYS HERITAGE.

Title: Development and promotion of a transnational cultural tourism product linked to greenways and UNESCO cultural sites.

Action Title: "SUPPORTING THE PROMOTION AND DEVELOPMENT OF TRANSNATIONAL THEMATIC TOURISM PRODUCTS LINKED TO CULTURAL AND CREATIVE INDUSTRIES" COSME Work Programme [2017]

Lead partner/coordinator:

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Provincie Antwerp (Belgium)

Turismo Vivencial (Spain)

Stad Mechelen (Belgium)

Comunidade Intermunicipal do AVE (Portugal)

[www.greenwaysheritage.org](http://www.greenwaysheritage.org)

## **Greenways and UNESCO Heritage in Europe: The high potential of their joint promotion.**

Greenways are independent non-motorized routes, mainly using disused railways and canal towpaths. Safe, accessible and very attractive, they give easy access to areas of outstanding natural beauty (e.g. in mountainous areas, by way of tunnels and viaducts). (See Lille Declaration: <https://www.aevv-egwa.org/lille-declaration/>)

Greenways are a very appealing destination for active tourists who use non-motorized means of transports as their main way of exploring new territories, urban or rural. Especially for the later, greenways play a highly important role in the local economic development. Nowadays these sustainable itineraries increasingly expand all over the European continent.

They are undoubtedly, historic, cultural and natural assets with a huge tourist attractiveness. The future conversion of undeveloped disused railway lines into greenways represents a major growth potential; not to mention greenways based on canal towpaths, which exploit Europe's considerable hydraulic engineering heritage.

Cultural tourism linked to UNESCO World Heritage sites, is considered as a key asset for EU tourism. Many Greenways have UNESCO cultural heritage sites nearby although up until now there has been no joint promotional effort for these two important cultural resources to benefit from.

Therefore, the wealth and appeal of UNESCO sites and greenways as separate destinations could be multiplied if those destinations were to be combined. The two resources reflect the history of Europe, a shared identity, and the opportunity to reach a broader segment of tourists.

### **GREENWAYS HERITAGE:**

#### **Tourism product combining greenways and UNESCO sites**

The aim of the project is the development and diversification of the European tourism offer by developing new tourism products combining UNESCO + Greenways as common destinations.

A particular emphasis on the use of Cultural and Creative Industries (CCI)-related technologies, linked to greenways and UNESCO sites, is foreseen to better inform the visitors and enhance their experience.

The objective of this deliverable is the realization of a report to provide information about tourists and the impact on the territory. According to the Gran Agreement, this report has been made supported by online survey focus on to get information from key stakeholders.

The purpose of these surveys is to gather quantitative information from current data, the analysis and conclusions of which will show us the current situation and allow us to take better advantage of the combination of these two resources (Greenways + UNESCO Heritage) and so move forward in the planning, management and promotion of these itineraries as common destinations. The results is being useful for promotoros and managers of European greenways, and UNESCO sites and private companies, so that they can learn more about greenway resources and promote the inclusion of UNESCO World Heritage sites in greenway-related thematic itineraries and so contribute to sustainable tourism throughout Europe.

In order to carry out the above-mentioned online survey of key stakeholders, the following interest groups were identified as the main actors in the Greenways + Heritage binominal:

- Greeways Managers
- UNESCO Heritage sites Managers
- Tourism providers. SME's around Greenways

After these groups were identified, three different questionnaires were prepared. Although several questions are similar in the 3 types of questionnaires, others are especially oriented to the specific target group.


### English surveys

The purpose of these surveys is to gather quantitative information from current data, the analysis and conclusions of which will show us the current situation and allow us to take better advantage of the combination of these two resources (Greenways + UNESCO Heritage) and so move forward in the planning, management and promotion of these itineraries as common destinations. The results will also be useful for promotoros and managers of European greenways, and UNESCO sites and private companies, so that they can learn more about greenway resources and promote the inclusion of UNESCO World Heritage sites in greenway-related thematic itineraries and so contribute to sustainable tourism throughout Europe.

We kindly ask you to take a few minutes to fill in this questionnaire, in the knowledge that you are helping us to move forward in the enhancement of the touristic and cultural offer of European greenways combined with UNESCO Heritage sites in Europe.

#### GREENWAYS STAKEHOLDERS SURVEY


➤ Complete the Survey online



➤ Download the Form in PDF

#### UNESCO STAKEHOLDERS SURVEY


➤ Complete the Survey online



➤ Download the Form in PDF

#### PRIVATE SECTOR STAKEHOLDERS SURVEY

➤ Complete the Survey online



➤ Download the Form in PDF

### Encuestas en español

To try to achieve a greater impact and a greater number of responses the questionnaires were conducted in English, Italian and Spanish and published on [www.aevv-egwa.org/projects/greenways-heritage/survey/](http://www.aevv-egwa.org/projects/greenways-heritage/survey/).

Subsequently, questionnaires were added on this same website aimed at greenways users and UNESCO visitors (Deliverable D.2.3 - Study of needs and the behaviors of the Tourism. Responsible partner: UNIMI)

This task was developed by the FFE in collaboration with the coordinating partner EGWA at all times and the Italian partner UNIMI.

- [GREENWAY STAKEHOLDERS SURVEY >>](#)
- [UNESCO STAKEHOLDERS SURVEY>>](#)
- [PRIVATE SECTOR STAKEHOLDERS SURVEY >>](#)

In the 3 questionnaires there are questions about the offer, demand, and more importantly: the relationship between both types of resources (Greenways + UNESCO heritage)

Some questions, such as the following, are key to the analysis:

- ☐ Is there any kind of cooperation between the managers of the UNESCO Heritage site and your greenway?
- ☐ Do you think that the visitors to your greenway are interested in visiting the UNESCO Cultural Heritage site?
- ☐ Do you know of any tourism packages offering both resources (Greenway + UNESCO Heritage) in the same product?
- ☐ ..... etc.

The different questionnaires (and the versions in the 3 languages) were designed during the month of May. The survey was published and launched in the first week of June. The survey was active until 6 October 2019 to try to get more answers. From this moment on, the statistical analysis began.

In addition to being published on the EGWA website, the FFE made an effort to communicate these surveys through its own channels:

- 3 News on InfoVías Verdes Newsletter (ESP). [June 2019>>](#) [July 2019 >>](#) [September 2019 >>](#) (12.000 contacts each month)
- 3 Press Releases (ENG) in [June, July and August >>](#) (1.932 contacts each mailing)
- 2 Press Releases (ESP) in [July and August >>](#) (3.259 contacts each mailing)

There was also a significant dissemination through social networks with several publications on Facebook<sup>1</sup> and Twitter<sup>2</sup> pages managed by FFE and EGWA.

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<sup>1</sup>As examples: [June 21st](#); [September 16th](#); [October 1st](#); [October 2nd](#)

<sup>2</sup> As examples: [June 24th](#); [September 16th](#); [October 1st](#); [October 2nd](#)

This whole campaign has also served to promote the project in general terms.

The rest of the project partners were constantly urged to mobilise the survey among their stakeholders. This was one of the main requests in the internal meetings of partners (In Mechelen- May, Latvia- September).

In this way all the project partners have personally contacted the Greenways managers, UNESCO managers and the private sector. However, most of the partners stated that it was difficult to achieve the initial objective: to obtain at least 50 answers for each partner.

Finally, **three statistical analysis reports** have been obtained and can be found in Annex 1 to this report. The preliminary results were also presented at the final Project Conference held in Dikli, Latvia on 5 September 2019.

**Difficulties:** It is an activity that has consumed a lot of dedication. Although it has not been difficult to develop and implement, it has been difficult to achieve the indicators initially proposed (400 responses).

This led to the survey being active for a longer period and therefore to the analysis and the report being carried out later than originally planned (M14).

One of the difficulties stems from the condition of the specific and limited number of UNESCO sites around the greenways in all countries, which means that the possible sample is greatly reduced. On the other hand, the very typology of the different partners has made it difficult to reach all interest groups.

For example, there are partners with a strong local character that prevents them from extending their range of influence to other areas of their country (e.g. CIM do AVE, Mechelen city and Antwerp province). Or for example, the company TUVI, partner of the project, has been able to mobilize the survey among the private sector, but not among the Greenways managers.

For its part, the FFE has been relatively easy to reach the Greenways stakeholders but not the UNESCO managers.

On the other hand, at first a certain resistance was found to answer this type of questionnaire. The questionnaires were initially longer and more ambitious (for example, data from different years were required to deal with comparative data). To counter this risk the survey was reduced by several questions and others were simplified to get more answers.

Another difficulty encountered was that many of the itineraries managers do not recognize these routes under the "Greenways" label. In order to overcome this difficulty, it was therefore necessary to contact them personally in order to explain the concept and get them to

complete the questionnaire. This underlines the need to continue to promote the concept of "Greenways" at European level.

## **Results:**

### **Performance Indicators:**

	N° Survey / Questionnaires	N° Entries (Greenways Sector)	N° Entries (Unesco Sector)	N° Entries (private sector)	N° Entries (Total)	N° of reports
Performance Indicators:	1	-	-	-	400	1
Results:	<b>9</b> (greenways, Unesco managers and private sector x 3 languages)	42	9	87	<b>138</b>	<b>3</b> (by each type of stakeholders)

On the other hand, it is very positive to have these analyses and results of these **3 reports** even if the sample was smaller than initially expected. This work will allow continuing deepening in how to improve the binomial between the two types of resources.

Furthermore, the results indicate that the starting assumptions prior to the start of the project were correct, confirming the usefulness of this project as a whole. These analyses are also making it possible to see the strengths and weaknesses of the Greenways + Heritage idea and to verify very satisfactorily that the tourism products created under the project (D.1.2) are already being recognised by all interest group groups. This is valued as a very positive action.

Another of the conclusions of this small study is that this offer did not exist prior to the implementation of this project. The creation of these **15 products** is seen as the first such initiative around Greenways. It is expected to be followed by other tourist territories.

In addition, the results indicate the **forthcoming publication of the three reports** on the EGWA website. This will be of great interest to managers of UNESCO, European Greenways and the private sector as it will allow them to improve and advance in the creation of the tourist offer that links and values the Greenways and UNESCO Heritage.

Although not all the initial indicators have been achieved, the objectives pursued by this survey are considered to have been more than achieved.



## ANNEX 1

- Analysis of the Greenways Managers survey
- Analysis of the UNESCO Heritage sites Managers survey
- Analysis of the Private Sector Managers survey

Reports in Spanish available under request.





One of the main objectives of the Greenways Heritage Project is the design of questionnaires that gather useful information from Greenways managers, in order to determine the offer and demand for tourism around greenways and to determine the extent to which these infrastructures are linked to the UNESCO cultural heritage sites.

# Analysis of the Greenways Managers survey

**Greenways Heritage**

**Fundación de los Ferrocarriles Españoles**



Co-funded by the COSME programme of the European Union

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## INTRODUCTION

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The purpose of this survey is to gather quantitative information from current data, the analysis and conclusions of which will show us the current situation and allow us to take better advantage of the combination of these two resources (Greenways + UNESCO Heritage) and so move forward in the planning, management and promotion of these itineraries as common destinations.

The results will also be useful for promoters and managers of European greenways, and they will be shared with the managers of UNESCO Heritage sites so that they can learn more about greenway resources and promote the inclusion of UNESCO World Heritage sites in greenway-related thematic itineraries and how to contribute to sustainable tourism throughout Europe.

The aim is also to gauge the current level of use of greenways in Europe, and to obtain data regarding the profile of users and aspects related to the offer, heritage, (new technologies used for promotion), and aspects concerning local development and other benefits for the areas involved.

The questionnaire was designed during the month of May and the publication and launch of the survey took place in the first week of June. The survey was active until 6 October 2019 to try to obtain a greater number of answers, date when the statistical analysis of the same was started.

Google Forms has been chosen as a technological tool for creating questionnaires, but the version of the questionnaire in PDF format has also been used to be printed more easily and distributed to various meetings and gatherings.

In an effort to achieve greater impact and more responses, the questionnaires were conducted in different languages:

- **English.** See the questionnaire [here>>](#)
- **Italian.** See the questionnaire [here>>](#)
- **Spanish.** See the questionnaire [here>>](#)

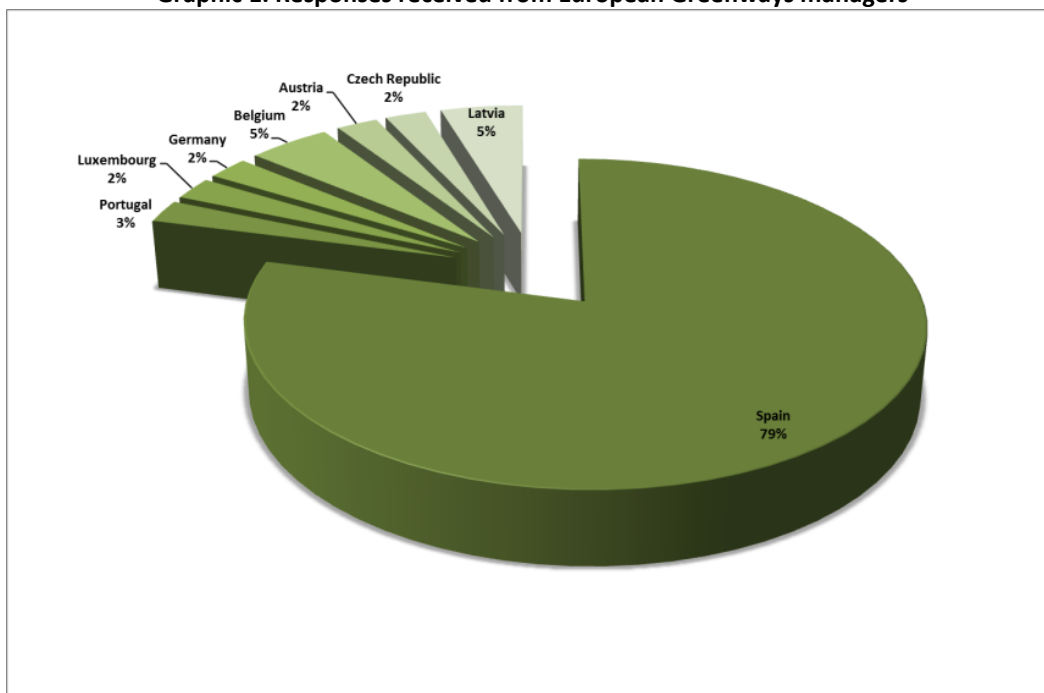
As for the structure of the questionnaire, it has been decided to divide it into the following blocks:

- **General information** - contact details of the Greenways Managers and basic data about these infrastructures.
- **Tourist offer and demand** - information of tourist interest about the number of visitors to the greenways, the profile of the user of these infrastructures, etc.
- **Greenways + UNESCO** - Cooperation relations between UNESCO site managers and greenway managers, whether or not there are links and/or products between these two tourist resources etc.

**Results:** A total of **42 responses** were obtained from different countries: Spain, Portugal, Luxembourg, Czech Republic, Austria, Belgium, Germany and Latvia (see Graph 1).

Although several countries have responded to this study, Spain has recorded the highest number of responses, at 79%.

**Graphic 1. Responses received from European Greenways managers**



Source: Fundación de los Ferrocarriles Españoles. October 2019

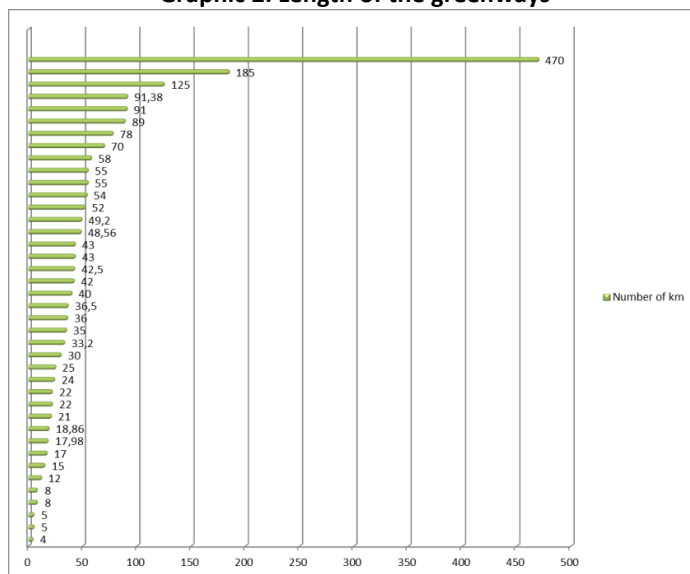
## TOURISM OFFER

### Length of the greenway (km):

In the vast majority of cases, these are small local greenways. These are followed by medium-sized and/or large-scale itineraries that usually cover cross-border territories. However, there are two greenways that are cross-border:

- Vennbahn Greenway – between Luxembourg, Germany and Belgium
- Praga Viena Greenway

Graphic 2. Length of the greenways

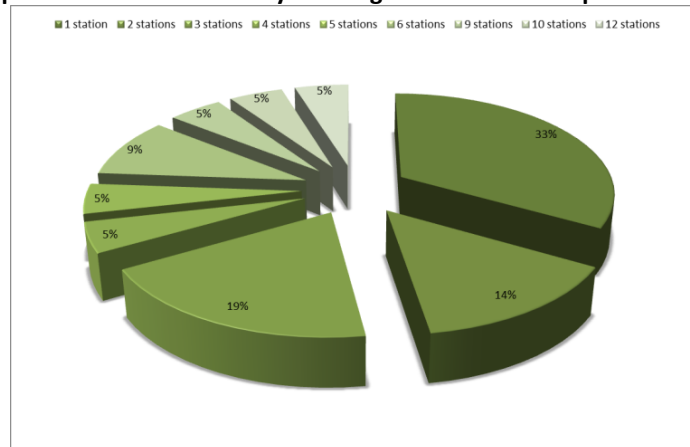


Source: Fundación de los Ferrocarriles Españoles. October 2019

### Number of railway buildings refurbished and put to new use:

It has been observed that the longer the greenway, the greater the number of railway buildings with new uses.

Graphic 3. Number of railway buildings refurbished and put to new use



Source: Fundación de los Ferrocarriles Españoles. October 2019

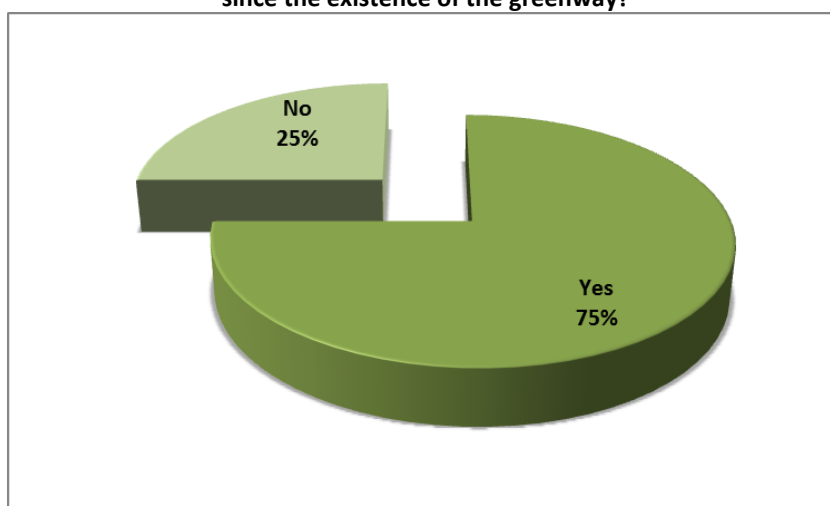
**Do you consider that the offer of tourist facilities in your area or region has increased since your greenway has existed?**

Tourism facilities have increased (75%) due to the existence of a greenway in a certain territory. This is made much more effective especially in Spain, since these infrastructures often pass through predominantly rural territories, thus contributing to the tourist development of new territories.

On the other hand, those managers of greenways who have answered in the negative are managers of greenways that pass especially through urban territories of important economic, cultural, tourist importance, etc.; such as the Vennbahn Greenway, which passes through major cities in Germany and Belgium, cities which in themselves represent tourist attractions for their cultural and heritage offerings.

However, when a greenway passes through rural areas, this becomes, possibly, the main tourist attraction and as such, its potential to attract visitors is high, leading to the emplacement of numerous tourist facilities around this infrastructure.

**Graphic 4. Has the offer of tourist facilities increased since the existence of the greenway?**



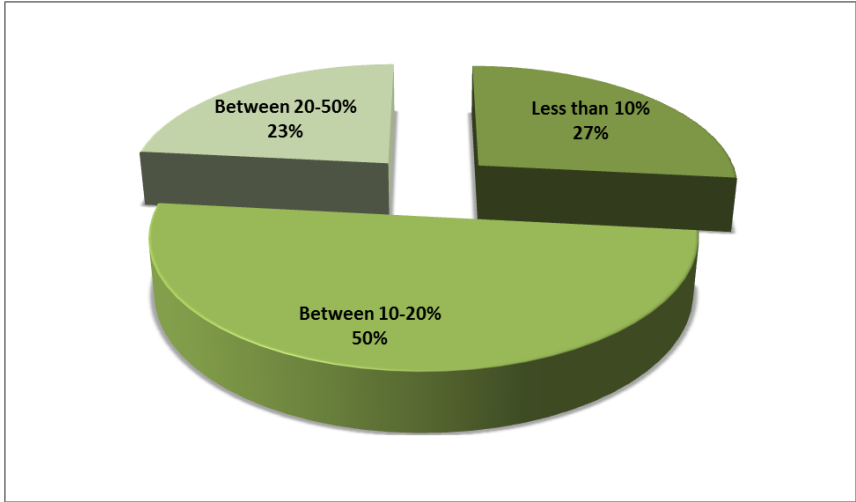
Source: Fundación de los Ferrocarriles Españoles. October 2019

**If you think it has increased, by what percentage would you estimate?**

It is estimated that the offer of tourist facilities has increased by 10-20% thanks to the greenways. As was mentioned in the previous question, the answers are directly proportional to the type of territory through which the greenway operates.

If it passes through rural areas and is one of the few tourist attractions in the zone, then, of course, the offer of tourist facilities increases much more than in urban and/or peri-urban areas where there are many more tourist resources besides the greenway itself. In this case, the tourist offer around the greenway is not so high.

**Graphic 5. Increase in the offer of tourist facilities thanks to the existence of the greenway**

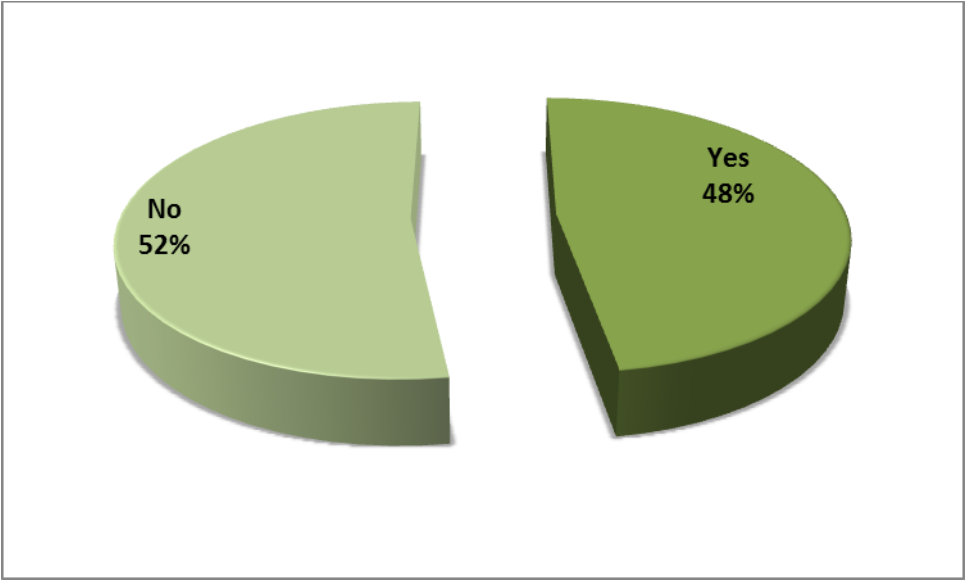


Source: Fundación de los Ferrocarriles Españoles. October 2019

**Have you noticed the existence of tourism packages from domestic or foreign companies in which your greenway is being marketed?**

The answers are relatively equal. It should be stressed, however, that the vast majority of the affirmative answers come from Spain's Greenway managers. For a few years now it has been working hard to create tourist packages based on greenways. Although the offer of tourist packages around these infrastructures is increasing in Spain, responses from other countries indicate that the offer is still limited.

**Graphic 6. Tourism packages that have marked the existence of the greenways**



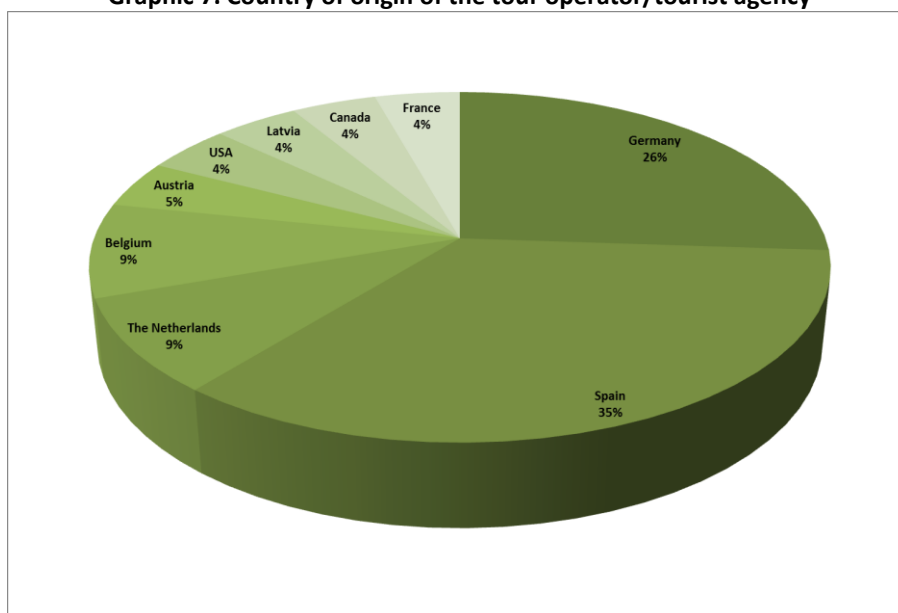
Source: Fundación de los Ferrocarriles Españoles. October 2019

**If you answered yes and if you know, add the country of origin of the tour operator/ tourist agency.**

The graph shows the countries that are marketing greenways. The percentage relative to Spain is actually conditioned by the fact of the sample number, where there are many responses from this country. Understanding this fact, it could be pointed out that the countries that are most commercializing this type of itinerary are Germany, Holland and Belgium.

In short, it can be seen that it is the countries that have strong roots in the cycling culture in particular and in sustainability in general that have created tourist packages around greenways.

**Graphic 7. Country of origin of the tour operator/tourist agency**



Source: Fundación de los Ferrocarriles Españoles. October 2019



## TOURISM DEMAND

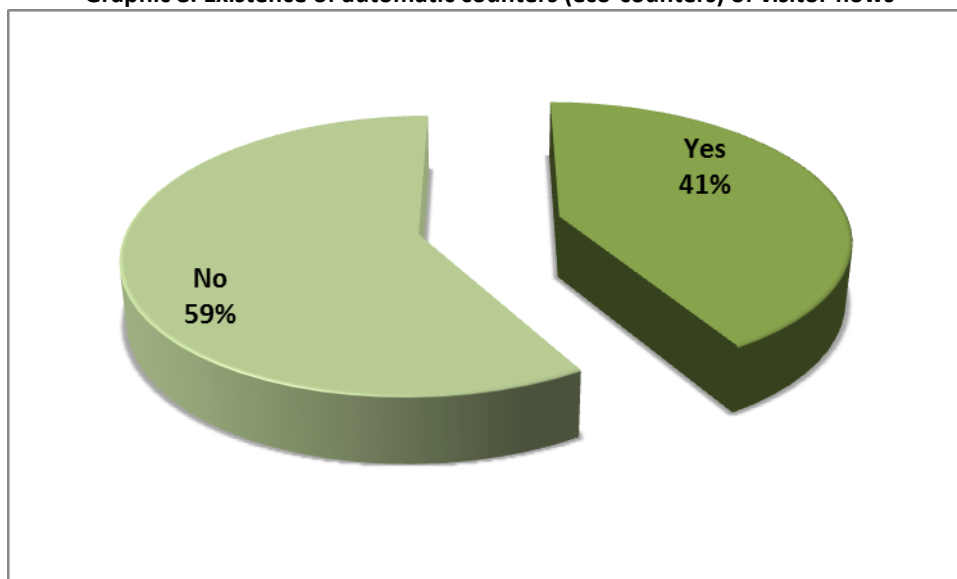
### Please say whether there are automatic counters (eco-counters) of visitor flows:

One of the main problems facing the greenways is the lack of statistical data on the availability of information on visitors' use of these infrastructures. This translates into a lack or scarcity of eco-meters that record the passage of travelers on greenways.

It should be stressed that the longer and more popular the greenway, the more likely it is that there are eco-meters located at different strategic points on the route. Another aspect of particular interest is that the Greenway manager is the main actor in the existence or otherwise of eco-meters along these sustainable infrastructures. Those greenways managed by the provincial or regional administration are much more likely to have several eco-meters.

However, those greenways that are short-distance and are managed locally do not usually have eco-meters and, as such, do not have statistical information from users of the route.

**Graphic 8. Existence of automatic counters (eco-counters) of visitor flows**



Source: Fundación de los Ferrocarriles Españoles. October 2019

### Please indicate the number of total users in 2018 or the last registered year. (Also indicate the year):

Closely related to the previous response, the scarcity or lack of eco-meters along the greenways makes it impossible to generate statistical data. Therefore, those greenways that do not have eco-meters and that are the majority; do not have this type of information. The greenways that do have eco-meters along their route usually receive an average of around 400,000 visitors a year. This is the case of the Greenway of FC. Vasco Navarro (Spain), Vienna Prague Greenway or Vennbahn Greenway (Luxembourg, Germany, Belgium).

### Number of users by BIKE in 2018 or the last registered year:

Those greenways that have eco-meters and that are long-distance and enjoy a lot of popularity, usually register on average more than 250,000 visitors by bicycle per year. On the

other hand, the greenways that do not have eco-meters have not provided answers due to lack of data.

### Number of users on FOOT in 2018 or the last registered year

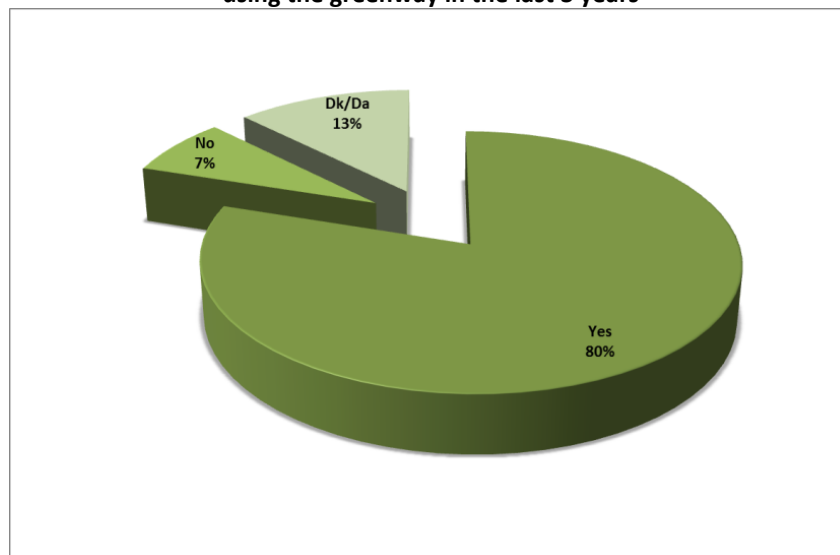
It is a relatively difficult task to count the number of travelers who enjoy greenways on foot. It is difficult because of the simple fact that the vast majority of the eco-meters register only those passengers on bicycles and/or those who enjoy these infrastructures in their wheelchairs. There are few greenways that have mixed eco-meters that allow them to count people on foot.

With that said, the greenways that do have these facilities are, once again, those that enjoy a lot of popularity, long-distance and provincial and/or regional management and therefore have greater purchasing power to buy such devices. In the case of these greenways, it is alleged that on average more than 110,000 users are registered on foot.

### Have you noticed an increase in the number of tourists using your greenway in the last 3 years?

In the last three years, 80% of the greenways mentioned in this study have seen an increase in travelers interested in enjoying and getting to know these infrastructures. This fact is of special importance and points towards a constant and continuous interest of tourists who seek alternative practices to the classic tourist destinations already consolidated, mature and sometimes saturated.

**Graphic 9. Increase in the number of tourists using the greenway in the last 3 years**



Source: Fundación de los Ferrocarriles Españoles. October 2019

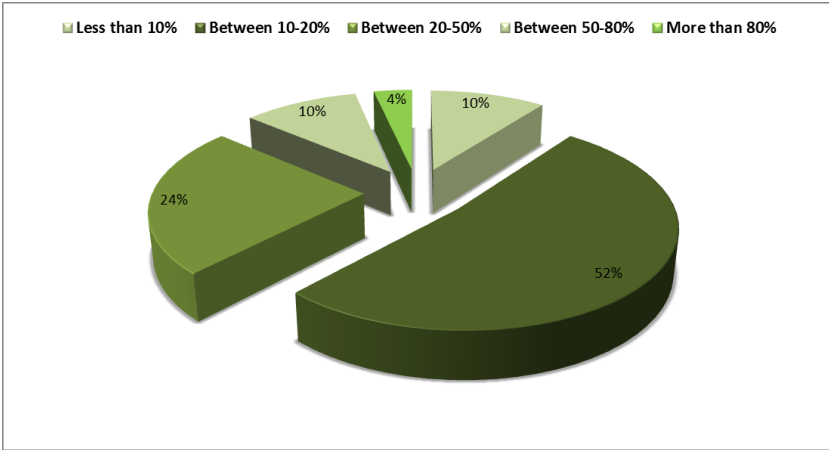
### If you answered yes, by what percentage would you say the number of visits to your greenway has increased in the last 3 years?

In the last three years, the visit to the greenway tourist destinations that have been mentioned in this study has increased by around 10-20%. Second are those greenways that have increased their number of visits around 20-50% for example the FC Greenway Vasco Navarro (Spain).

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The percentage of visitors increased by more than 80% impacts and that is the case of the Santander-Mediterranean Greenway (La Bureba section) in Spain.

**Graphic 10. Percentage of increase in the number of visits to the greenway in the last 3 years**

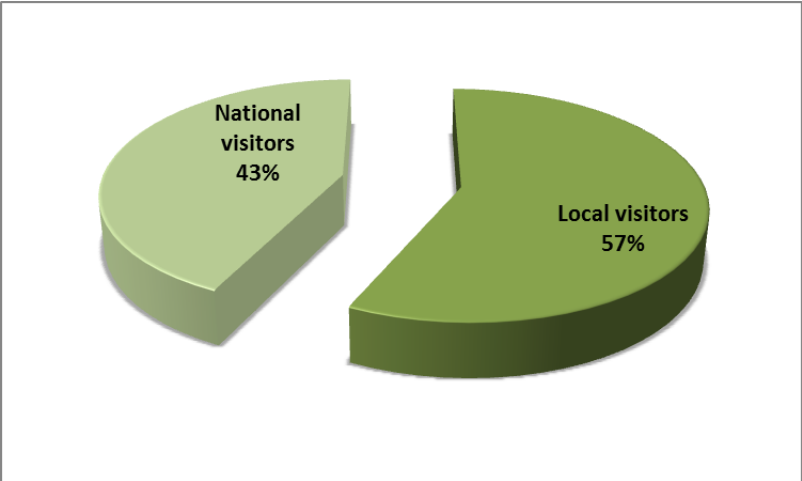


Source: Fundación de los Ferrocarriles Españoles. October 2019

**Please tell us the profile of users of your greenway:**

The following graph shows that 57% of the users of greenways come from the same territory as the Greenway. Therefore, they are largely local users who enjoy and want to know their territory or they are people who find on the greenway a means of daily travel between different villages or an infrastructure for daily healthy leisure practice.

**Graphic 11. Profile of users of the greenways**

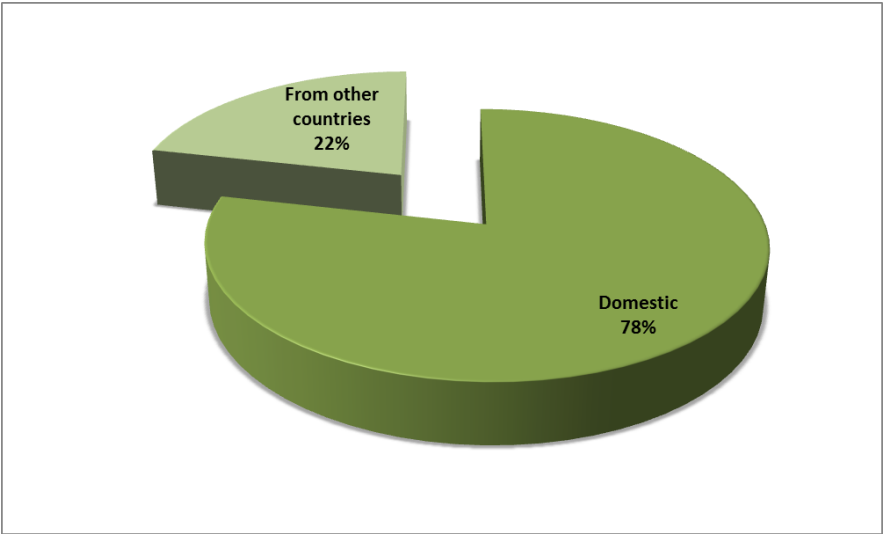


Source: Fundación de los Ferrocarriles Españoles. October 2019

**Please tell us what percentage of visitors you think are domestic and what percentage is from other countries:**

Closely linked to the previous answer, it is noted that 78% of the users of greenways are domestic travelers. But of course there are also many users from other countries.

**Graphic 12. Profile of users of the greenways**



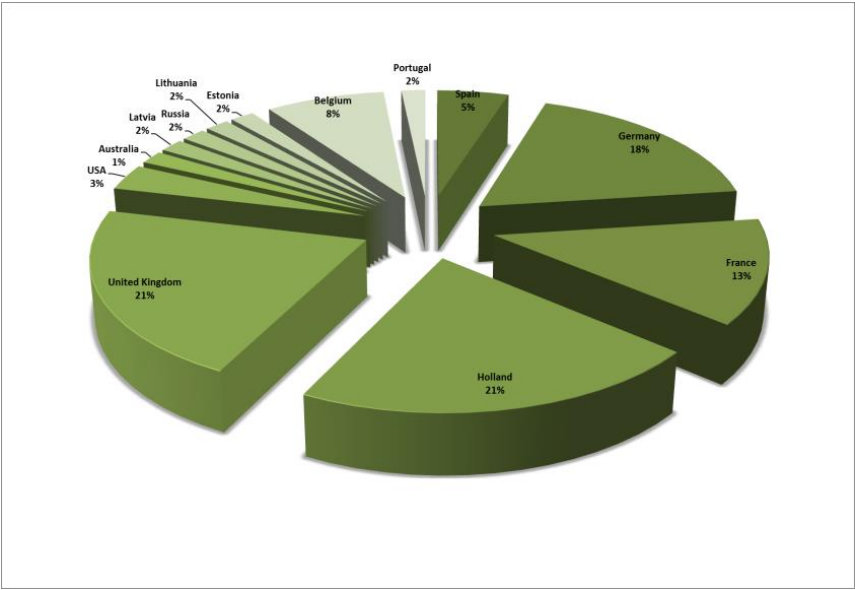
Source: Fundación de los Ferrocarriles Españoles. October 2019

**What are the main countries of origin of the visitors?**

Graph 13 shows the countries of origin of users of greenways. It is not at all surprising to see that these are precisely those countries whose culture is deeply rooted in the use of sustainable transport, such as cycling.

Countries such as the Netherlands, Belgium, France or Great Britain are the countries of origin that make the most use of the bicycle as a daily transport and whose inhabitants usually travel to other destinations for touristic itineraries by bicycle.

**Graphic 13. Main countries of visitors' origin**



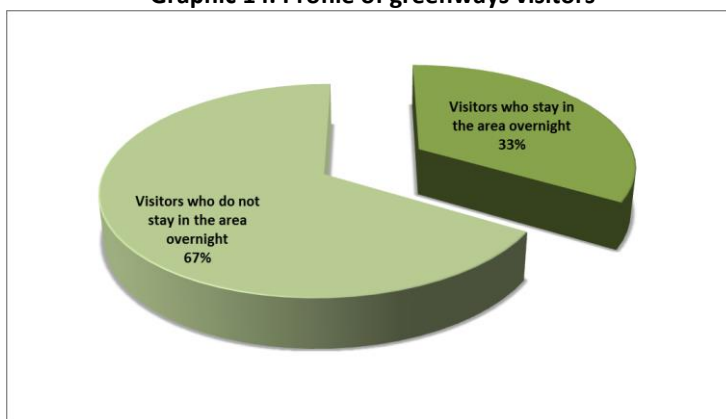
Source: Fundación de los Ferrocarriles Españoles. October 2019

### Please tell us the profile of the visitors (non-residents) of your greenway:

67% of greenways users do not usually spend the night in the area. The reason for this result may be due to the fact that many of the greenways mentioned in this study are small and/or medium-sized.

On the other hand, users travelling along long greenways, such as the FC Greenway Vasco Navarro (Spain), the Vennbahn Greenway or the Vienna Prague Greenway do stay at certain sites for a certain time. It is highlighted in the responses that users who travel greenways that pass through urban areas usually stay overnight while users who pass through rural greenways do not make as much use of the accommodation offer in the area. This may relate to a question of the availability of accommodation in different places.

**Graphic 14. Profile of greenways visitors**

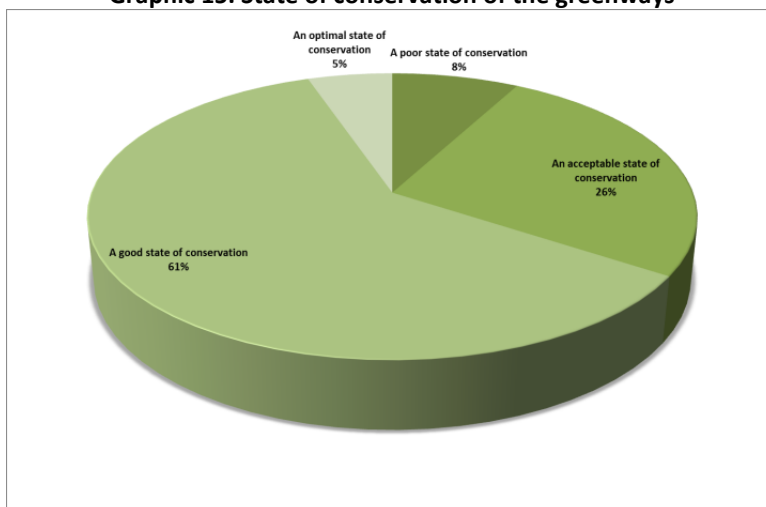


Source: Fundación de los Ferrocarriles Españoles. October 2019

### With regard to maintenance, do you consider that your greenway is in ...?

61% of greenway managers consider their infrastructure to be in a good state of conservation and 26% believe that the greenway they are guarding has an acceptable state of conservation, while 8% consider the conservation status to be bad.

**Graphic 15. State of conservation of the greenways**



Source: Fundación de los Ferrocarriles Españoles. October 2019

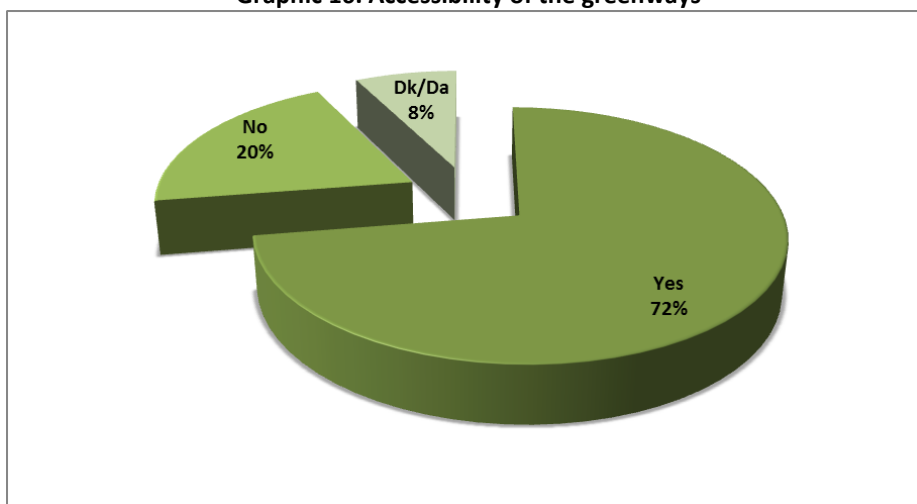
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**Do you consider that your greenway is accessible for everyone (including people with disabilities)?**

72% of managers say that the greenways they manage are accessible to all types of users. Part of the answer was to be expected since the greenways are themselves linear infrastructures whose basic principle is precisely the universality of their users.

However, it is worth focusing on the fact that 20% of the managers of greenways consider that their itineraries are not accessible, this being a high percentage considering that we are talking about itineraries designed for the use of the entire population.

**Graphic 16. Accessibility of the greenways**



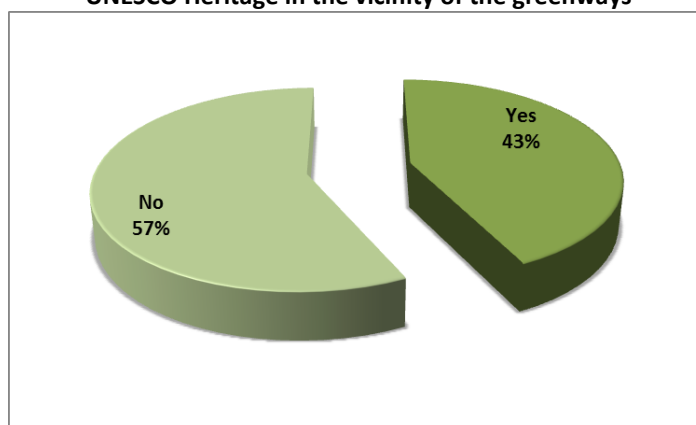
Source: Fundación de los Ferrocarriles Españoles. October 2019

## GREENWAYS AND UNESCO HERITAGE SITES

**Is there tangible or intangible UNESCO Heritage in the vicinity of your greenway? (Less than 10 km away). Identify it:**

43% of the greenway managers who have responded have a tangible or intangible UNESCO heritage near their greenway.

**Graphic 17. Existence of a tangible or intangible UNESCO Heritage in the vicinity of the greenways**

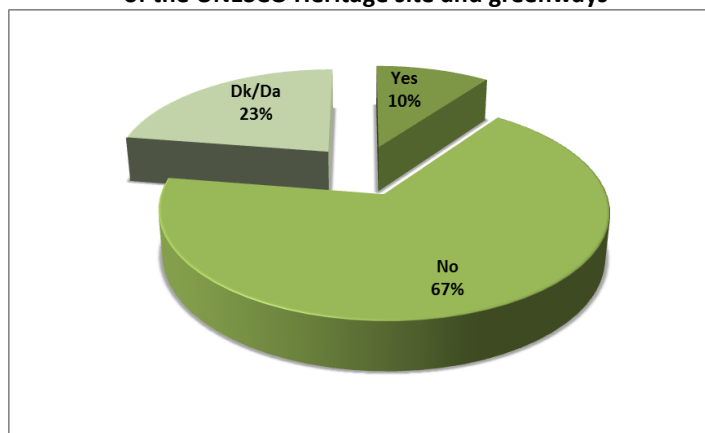


Source: Fundación de los Ferrocarriles Españoles. October 2019

**Is there any kind of cooperation between the managers of the UNESCO Heritage site and your greenway (structured or informal)**

67% of Greenway managers say they do NOT cooperate with UNESCO Heritage Site Managers. Clearly, this response reinforces the need to create links between these two entities and the Greenways Heritage project, as a pioneer in this regard, will be the perfect tool to start lines of joint action between the promotion of greenways and UNESCO heritage as a common tourist destination and as attractive elements to be combined in tourist products.

**Graphic 18. Cooperation between managers of the UNESCO Heritage site and greenways**



Source: Fundación de los Ferrocarriles Españoles. October 2019

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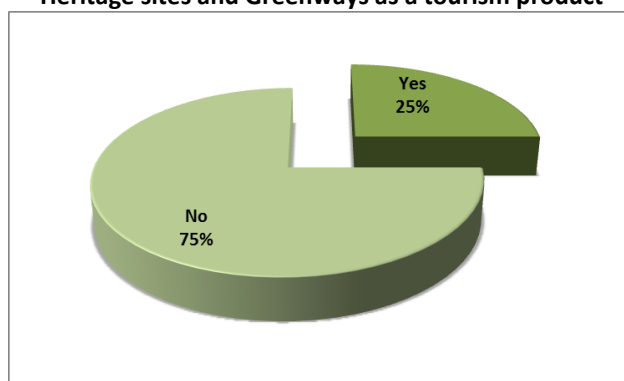


### Do you think that the two resources (UNESCO Heritage and Greenway) are integrated as a tourism product?

Another question of particular interest to this study is the integration of greenways and UNESCO heritage sites as a joint tourism product.

The Greenways Heritage project has developed precisely and appropriately to the fact that so far there was no joint integration of these two tourist resources as a common destination and tourist product. Based on this premise, the fact that 75% of the questions were negative was to be expected. For this reason, the Greenways Heritage project works on the joint promotion of these two resources with great cultural and natural potential, with the aim of offering the consumer and tourist user an alternative product to what exists in the market to date.

**Graphic 19. Integration of the UNESCO Heritage sites and Greenways as a tourism product**

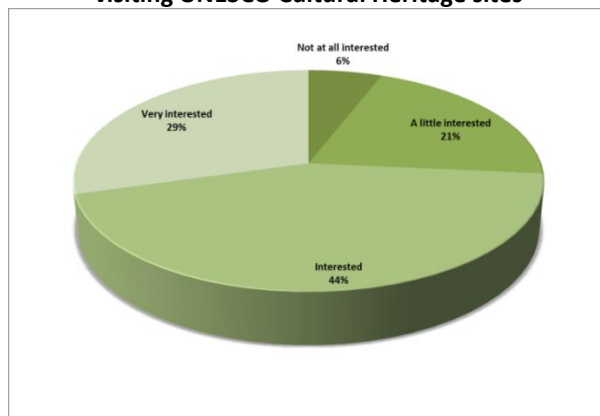


Source: Fundación de los Ferrocarriles Españoles. October 2019

### Do you think that the visitors to your greenway are interested in visiting the UNESCO Cultural Heritage site?

44% of greenways travelers would be interested in visiting UNESCO heritage sites and 29% would be very interested. This demonstrates the high tourist attractiveness and the cultural and natural potential to jointly promote these two tourist resources.

**Graphic 20. Interest of greenways visitors in visiting UNESCO Cultural Heritage sites**



Source: Fundación de los Ferrocarriles Españoles. October 2019

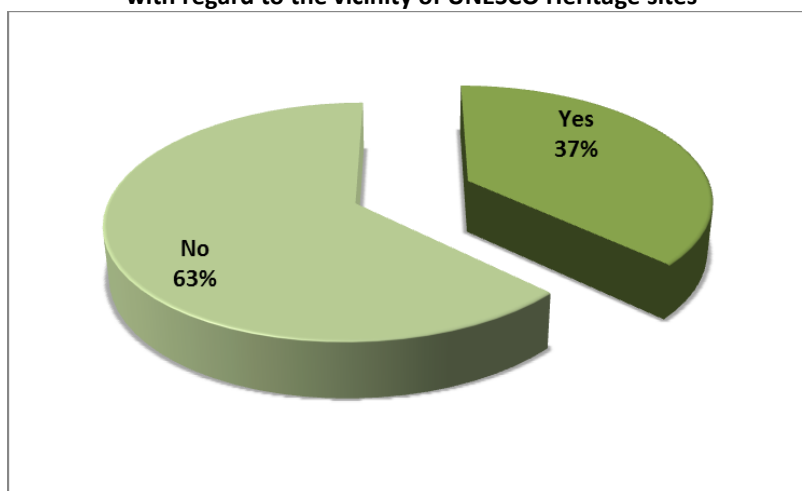


### Does the information on the Greenway include any reference to the UNESCO Heritage in its vicinity?

As the joint promotion of greenways with UNESCO heritage sites is still in a nascent state, and since the two tourism resources have never so far been interlinked for common promotion; the fact that 63% of the responses were negative points to a correlation between the responses.

However, 37% of respondents say that there is information along the greenways on the existence of UNESCO heritage sites. Such cases have been recorded in those territories where Greenways Heritage project partners are acting as in the case of Spain, Latvia and Italy.

**Graphic 21. Information included on greenways with regard to the vicinity of UNESCO Heritage sites**



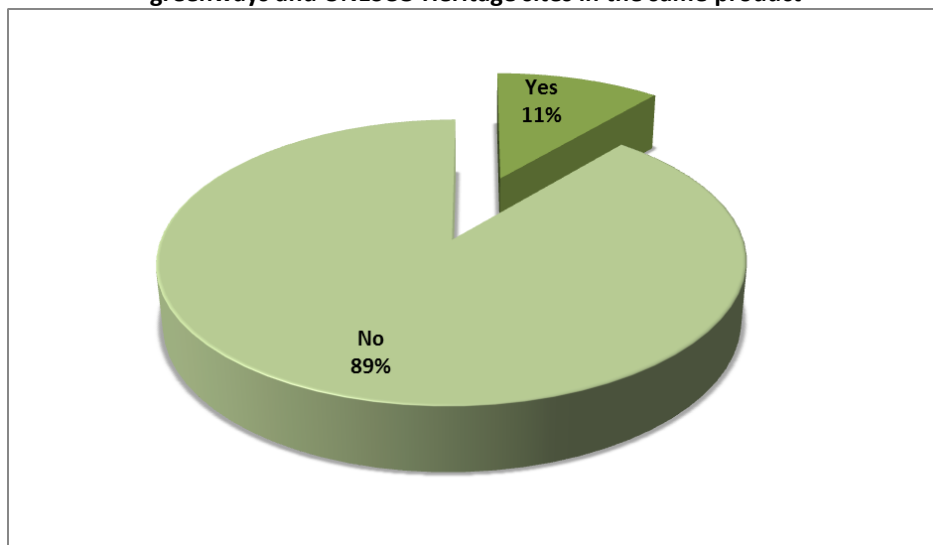
Source: Fundación de los Ferrocarriles Españoles. October 2019

### Do you know of any tourism packages offering both resources (Greenway + UNESCO Heritage) in the same product?

Closely linked to the previous questions, the answers offered by the respondents who have collaborated in carrying out this study are directly proportionate to the others. Indeed, as shown in Graph 19, more than half of those polled say that there is no tourist package offering greenways and UNESCO heritage sites in the same tourism product.

However, as in the previous question, respondents are those from partner countries of the Greenways Heritage project who are beginning to jointly promote these two resources of high natural and heritage value in the same product tourist.

**Graphic 22. Existence of tourism packages offering greenways and UNESCO Heritage sites in the same product**



Source: Fundación de los Ferrocarriles Españoles. October 2019

**Please describe the offers here:**

The tourist offers that have combined UNESCO heritage sites and greenways have been the following:

- ✳ Offers designed by Greenways Travel Club, travel agency specializing in active travel in the Czech Republic and Slovakia.
- ✳ Offers designed by Turismo Vivencial (partner of the Greenways Heritage project), being the SME that has **generated 15 tourism products in 9 countries** (See deliverable D 1.2.)
- ✳ Joint offer between BTT Routes Vía Verde Sierra Norte de Sevilla and the Sierra Norte de Sevilla Geopark
- ✳ Offers designed by the Club del Viajero a los Arribes del Duero.

This response highlights the fact that, thanks to this project, the offer (still a minority), which already exists in the tourist market today is due in particular generated under the Greenways Heritage project. This is particularly evident in the Spanish case.

## CONCLUSIONS

- ✱ All the greenway managers who have contributed to this study are of public competence belonging especially to a regional and provincial territorial scale.

### ✱ TOURISM OFFER

- There are mostly small-length greenways.
- The longer the greenway, the greater the number of railway buildings with new uses
- It can be seen in part of the 75% that tourist facilities have increased due to the existence of a greenway in a certain territory. This is made much more effective especially in Spain, since these infrastructures often pass through almost all rural areas. When a greenway passes through rural areas, this becomes, possibly, the main tourist attraction and as such, its potential to attract visitors is high, resulting in numerous tourist facilities being located around this infrastructure.
- 52% of the greenway managers who answered the questionnaire do not know about the existence of tourist packages around greenways.
- The countries in which the destination is marketed greenways correspond to those territories where the culture of the bicycle is deeply rooted with the daily tasks. In view of this, the countries that are marketing this type of itinerary the most are Germany, Belgium, Holland and France.

### ✱ TOURISM DEMAND

- 59% of the greenways managers who responded stated that they did not have any eco-meters to measure the flow of visitors.
- Long-distance greenways tend to have eco-meters while small itineraries of few kilometers do not have them.
- Many greenways do not have tourist flow meters and therefore do not have statistical data on this aspect.
- Long-distance greenways such as the FC Greenway Vasco Navarro, Veenbahn Greenway or Vienna Prague Greenway usually receive on average, annually, more than 400,000 visitors.
- The profile of the user travelling along greenways, as stated by the managers of these infrastructures, is as follows:
  - At the national level, these are local users, people who live in the same territory through which the greenway runs and who do not spend the night.
  - Only 22% of the trips are from other countries. Countries such as the Netherlands, Belgium, France or Great Britain are the countries of origin that make the most use of the bicycle as a daily transport and

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whose inhabitants usually travel to other destinations for touristic itineraries by bicycle.

- 61% of greenway managers consider their infrastructure to be in a good state of conservation, while 8% consider the conservation status to be poor.
- 72% of managers say that the greenways they manage are accessible to all types of users.

### **GREENWAYS AND UNESCO HERITAGE**

As a starting point for the development of this study, a number of hypotheses have been formulated that have been contrasted with these answers.

- 43% of the responding greenway managers have a tangible or intangible UNESCO heritage near their greenway.
- 67% of the greenway managers state that they do NOT cooperate with UNESCO Heritage Site Managers and 75% of them do not consider that both resources are integrated as one tourism product. Moreover, the vast majority of them state that the information on greenways does not specify anything about the UNESCO heritage site located close to the itinerary. This is because the joint promotion of greenways with UNESCO heritage sites is still in a nascent state, and since to date the two tourism resources have never been interlinked for common promotion.
- 73% of respondents agree that tourists travelling the greenways would be interested and very interested in visiting UNESCO heritage sites. This demonstrates the high tourist attractiveness and the cultural and natural potential to jointly promote these two tourist resources.

Fundación de los Ferrocarriles Españoles  
October 2019



The objective of this survey is to obtain quantitative information whose analysis and conclusions allow us to know the current situation and improve the combination of resources (Greenways + UNESCO Heritage) and thus advance in planning, management and promotion of these routes as common destinations. In addition, raise awareness of the Greenways HERITAGE project among UNESCO heritage managers so that they can learn more about greenways and promote the integration of UNESCO World Heritage sites into thematic routes linked to and contribute to sustainable tourism throughout Europe.

# Analysis of the UNESCO site Managers survey

**Greenways Heritage**

**Fundación de los Ferrocarriles Españoles**



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## INTRODUCTION

The purpose of this survey is to gather quantitative information from current data, the analysis and conclusions of which will show us the current situation and allow us to take better advantage of the combination of these two resources (Greenways + UNESCO Heritage) and so move forward in the planning, management and promotion of these itineraries as common destinations.

It also aims to raise UNESCO Heritage site managers' awareness of the Greenways HERITAGE project so they can improve their knowledge of greenways as a tourism resource, and encourages the inclusion of UNESCO World Heritage sites in theme-based routes linked with greenways, thereby helping us move towards sustainable tourism all over Europe. The results will also be useful for greenway promoters and managers in Europe.

The questionnaire was designed during the month of May and the publication and launch of the survey took place in the first week of June. The survey was active until 6 October 2019 to try to obtain a greater number of answers, date when the statistical analysis of the same was started.

Google Forms has been chosen as a technological tool for creating questionnaires, but the version of the questionnaire in PDF format has also been used to be printed more easily and distributed to various meetings and gatherings.

In an effort to achieve greater impact and more responses, the questionnaires were conducted in different languages:

- **English.** See the questionnaire [here>>](#)
- **Italian.** See the questionnaire [here>>](#)
- **Spanish.** See the questionnaire [here>>](#)

As for the structure of the questionnaire, it has been decided to divide it into the following blocks:

- **General information** – contact details of UNESCO Heritage Site Managers and basic information about the heritage site such as its description and its cataloging date.
- **Tourism offer and demand** – information of interest about the UNESCO heritage site such as the number of tourists who come to resource, the profile of tourists (domestic, from other countries, if they spend the night), existence of heritage sites interpretation centers, accessibility of heritage site, etc.
- **Greenways + UNESCO** - existence of cooperative relationships between UNESCO site managers and greenway managers, existence or otherwise of links between these two tourist resources etc.

A total of 9 responses have been obtained. Among the UNESCO heritage sites mentioned are the old city of Salamanca, the historic center of Córdoba, the old city and aqueduct of Segovia, Altamira Cave (Spain) and Begijnhof & Belfort Kortrijk, St. Rumbold's Tower, the

Great Beguinage and Belfry of the town hall, heritage landmarks of Belgium.

Given the small sample it is important to note that the data and analysis of this study show only trends but cannot be considered conclusive data or extrapolated to the whole of the UNESCO Heritage of Europe.

It is worth emphasizing that in almost all cases, it is the municipalities that manage the UNESCO heritage sites; except for the Altamira Cave, which is managed by the Altamira National Museum and Research Centre (Ministry of Culture and Sport).



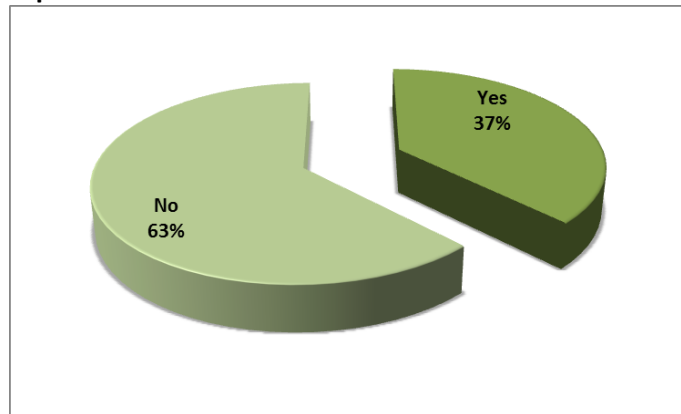
## TOURISM OFFER AND DEMAND

### Please say whether there are automatic counters of visitor flows:

The following graphic highlights the fact that only 37% of UNESCO heritage sites have access to visitor flow meters. This is the case of the old city of Salamanca and two heritage resources in Belgium: Begijnhof & Belfort Kortrijk and St. Rumbold's Tower.

The existence of eco-meters for the influx of visitors to UNESCO heritage sites is crucial given the saturation problems that many of these fragile resources may face. If there is no clear statistics on tourist arrivals, the problems caused by tourist overcrowding will be more difficult to minimize and control.

**Graphic 1. Existences of automatic counters of visitor flows**



Source: Fundación de los Ferrocarriles Españoles. October 2019

### Please indicate the number of visitors to the UNESCO site in 2018 or the last resisted year:

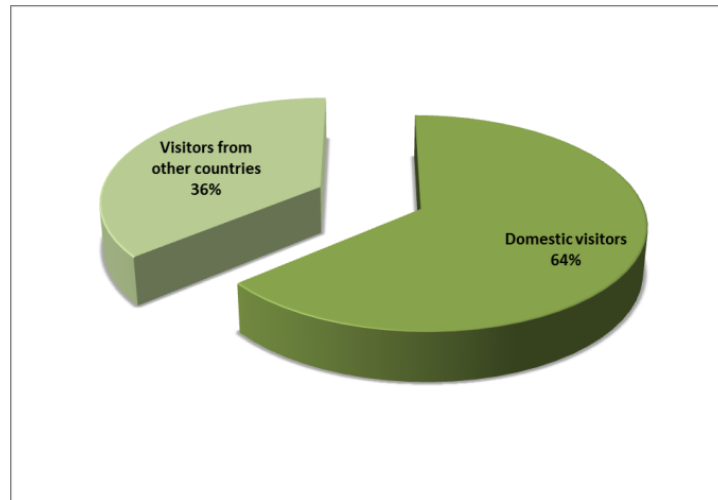
In the absence of statistical data, estimating the number of visitors is not an easy task and, as has been seen in the previous answer, few heritage resources are available for tourist influx counters.

However, those who do have such facilities installed, as is the case in the old city of Salamanca, say figures higher than the one million visitors registered in 2018. On the other hand, between 30,000 and 40,000 visitors to the two UNESCO heritage sites in Belgium have visited in 2018.

### Please tell us what percentage of visitors you think are domestic and what percentages are from other countries:

From the sample of responses received, it is noted that 64% of visitors to UNESCO heritage sites are domestic tourists from the same country. Only 36% represent tourists from other countries.

**Graphic 2. Visitors' profile: % of domestic visitors and % of domestic visitors**



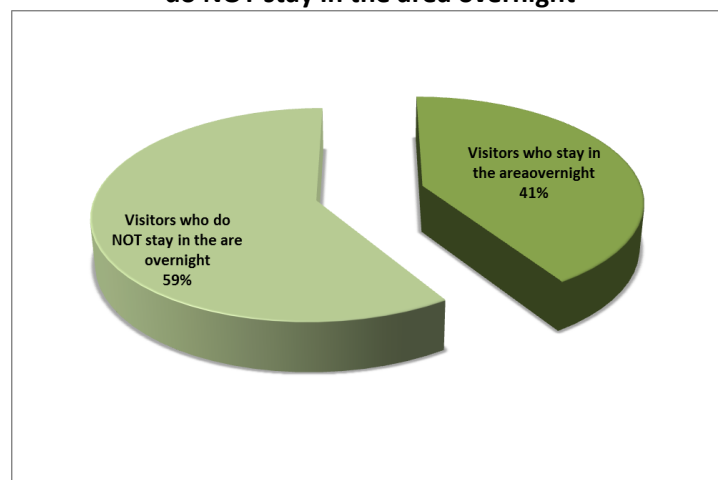
Source: Fundación de los Ferrocarriles Españoles. October 2019

**Please tell us the profile of the visitors (non-residents) of your UNESCO site who stay in the area overnight and those who DO NOT stay in the area overnight:**

Most of the UNESCO heritage sites are located in small towns and near cities with great tourist attractions. In fact, 59% of visitors do not usually spend the night in the area where the heritage is located. It is the case of the cave of Altamira for example that is located in Santilla del Mar (Spain), a town that is located a few kilometers from Santander, a coastal city that enjoys much popularity among tourists, or even Segovia, 80 km from Madrid that welcomes overnight visits. In the case of the city of Mechelen, 20 km from Brussels, the same kind of explanation may exist.

On the other hand, there would be those UNESCO heritage elements that are actually located in tourist cities, such as the cities of Salamanca and Córdoba in Spain; important cities with a wide range of leisure activities, apart from the historical-cultural and heritage offer itself.

**Graphic 3. Visitors who stay and do NOT stay in the area overnight**



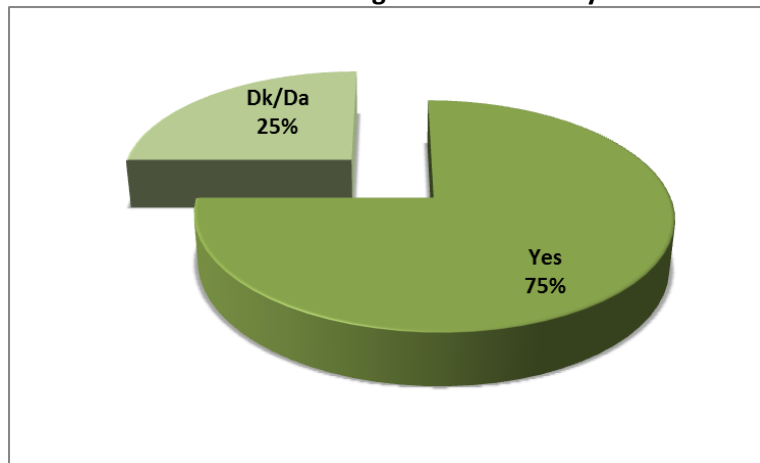
Source: Fundación de los Ferrocarriles Españoles. October 2019

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## Have you noticed an increase in the number of tourists using your UNESCO heritage site in the last years?

From years ago, cultural tourism enjoys a lot of popularity among visitors eager to know the history and discover high-value heritage sites. Based on this, and according to the responses offered by the different managers of UNESCO heritage elements, visits to heritage resources have increased considerably in the last year, at a rate of 75%. As already mentioned, the city of Salamanca (Spain) has received more than one million visitors during 2018.

**Graphic 4. Increase in the number of tourists using the UNESCO heritage site in the last year**

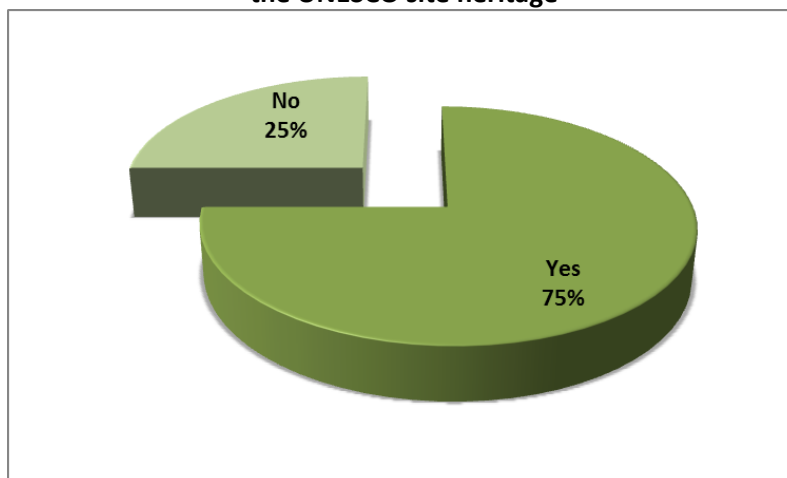


Source: Fundación de los Ferrocarriles Españoles. October 2019

## Do you have a visitor's center and/or any other facilities where visitors can obtain information?

More than half of the UNESCO heritage sites consulted have a visitor center. The existence of these spaces is crucial to know the history of the heritage site. In short, these are leisure spaces oriented towards the dissemination of high-value resources.

**Graphic 5. Existence of a visitors' center of the UNESCO site heritage**



Source: Fundación de los Ferrocarriles Españoles. October 2019

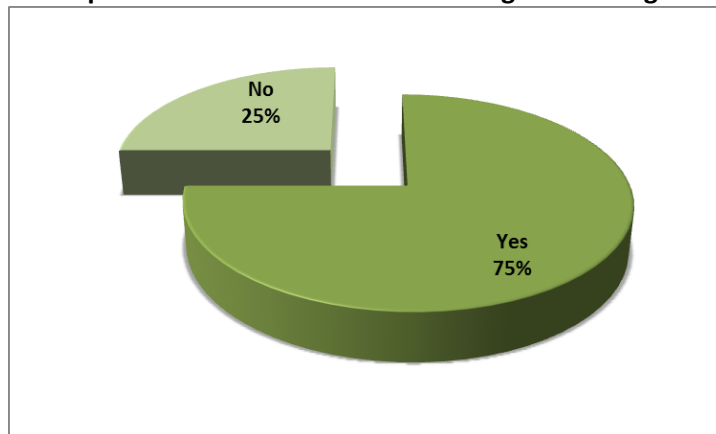
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**Do you make use of new UNESCO Heritage technologies to provide your visitors with information? What are they?**

More than half of UNESCO's heritage sites managers claim to use new technologies to raise awareness of the tourist resource. The new technologies applied to the dissemination of the most used UNESCO heritage sites are as follows:

- Augmented reality
- Virtual reality
- 3D Videos

**Graphic 6. Use of new UNESCO Heritage technologies**

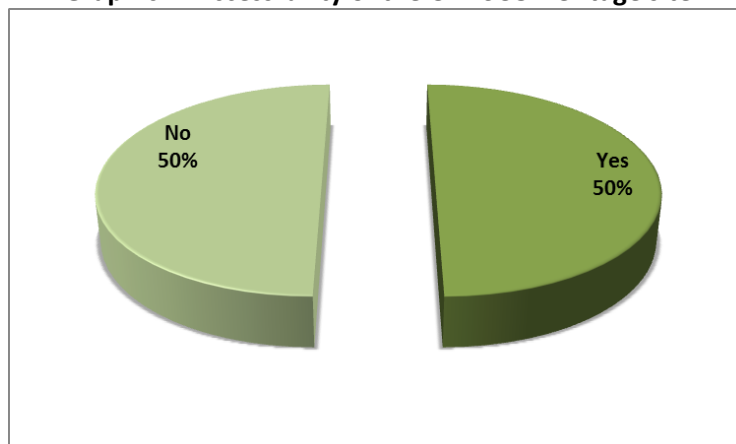


Source: Fundación de los Ferrocarriles Españoles. October 2019

**Do you consider that your UNESCO heritage site is accessible for everyone (including people with disabilities)?**

With regard to the accessibility of the UNESCO World Heritage site, the responses are equitable. 50% of the managers of these resources consider that their patrimonial element is accessible to all types of visitors, while the remaining 50% consider that it is not.

**Graphic 7. Accessibility of the UNESCO Heritage site**



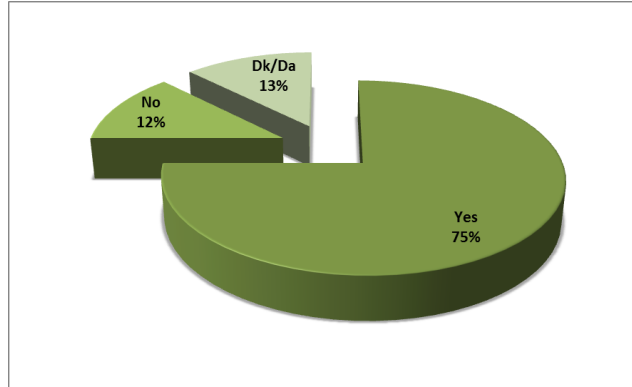
Source: Fundación de los Ferrocarriles Españoles. October 2019

## GREENWAYS AND UNESCO HERITAGE SITES

### Is there a Greenway in the vicinity of your UNESCO heritage site (less than 10 km away)?

Although in all cases there is indeed a greenway within 10 km of the UNESCO resource, 75% of UNESCO heritage sites managers are aware of it. On the other hand, 13% of those polled are unaware of this fact, and 12% think it does not exist, which indicates a great lack of knowledge about the resource "Greenway".

**Graphic 8. Existence of a Greenway near the UNESCO site Heritage**



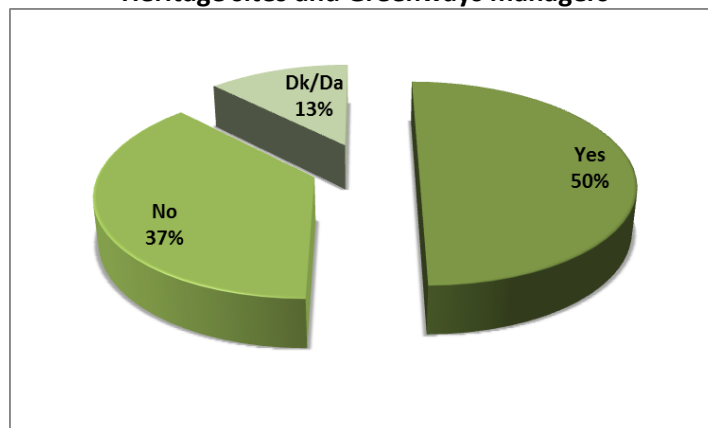
Source: Fundación de los Ferrocarriles Españoles. October 2019

### Is there any kind of cooperation between the managers of the UNESCO heritage site and the Greenway (structured or informal)?

The answers in this case may be a little conditioned by the fact of the sample. 50% of the responses to the questionnaire came from UNESCO Heritage sites Managers in Belgium (Provincie Antwerp and Stad Mechelen), two partner territories of the Greenways Heritage project.

However, there is a sense that there is actually less cooperation. The Greenways Heritage Project itself is being carried out precisely because this lack is identified in the tourist market and it is desired to achieve lines of joint actions between these two tourist resources.

**Graphic 9. Cooperation between UNESCO Heritage sites and Greenways managers**



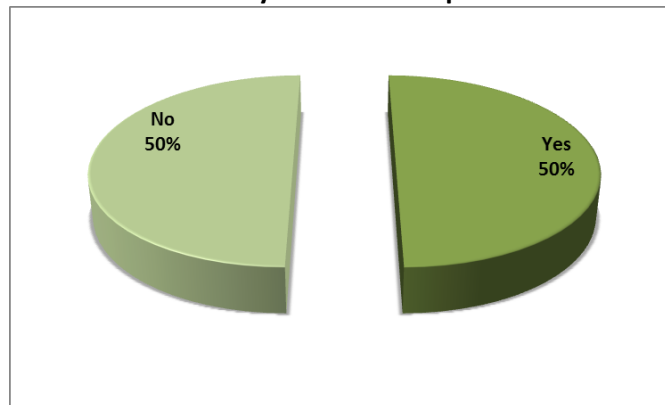
Source: Fundación de los Ferrocarriles Españoles. October 2019

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**Do you think that both resources (UNESCO heritage and Greenways) are integrated as a tourism product?**

This is the same as the previous answer. Half of the respondents are managers of UNESCO heritage sites from provinces in Belgium that are part of the Greenways Heritage project itself and that, clearly, the project has been successfully disseminated locally by those responsible for these entities assigned to carry out the project, making known the intention to create joint lines of action between the two tourist resources.

**Graphic 10. Integration of UNESCO Heritage sites and Greenways as a tourism product**



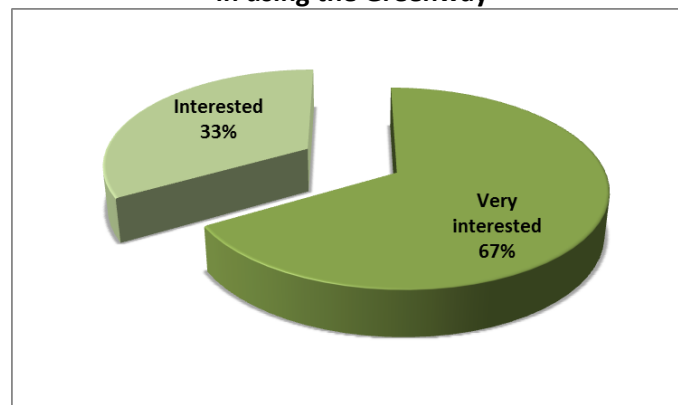
Source: Fundación de los Ferrocarriles Españoles. October 2019

**Do you think that the profile of visitors of the UNESCO Cultural Heritage site would be interested in using the Greenway?**

67% of UNESCO Heritage Site Managers believe that cultural tourists would be very interested in seeing and touring greenways and 33 % agree that visitors would be interested in enjoying these infrastructures.

In conclusion, the joint enjoyment of heritage sites and natural sites through which the greenways usually pass, would be a successful product that would enrich the tourist experience of visitors.

**Graphic 11. Interest of UNESCO Heritage sites' visitors in using the Greenway**



Source: Fundación de los Ferrocarriles Españoles. October 2019

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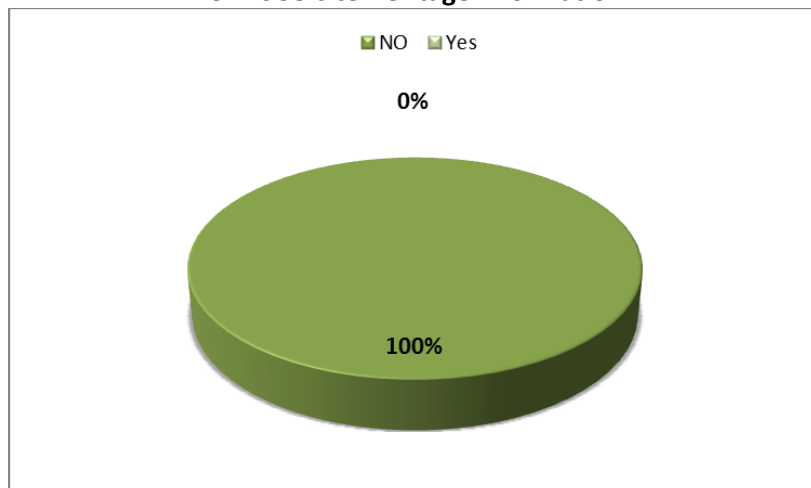
### Does the information about the UNESCO heritage site make any reference to the Greenway?

Currently there is NO information on greenways in UNESCO heritage site information dissemination materials.

If this question is compared with the opinion of the greenways managers, it can be seen that the latter do detect information about UNESCO in the greenways (in 37% of the cases), therefore the UNESCO Heritage represents a focal point for greenways; but not in the opposite direction. For the UNESCO site manager, greenways do not seem to be an argument for attraction and promotion.

However, even if the project is implemented in the short term, all the actions carried out under the project have and will continue in the future. The foundations have been laid for joint promotion between the two tourist resources and key ideas have been disseminated to European public administrations that will be the bodies that will give effect to all the project's approaches. So it would be interesting to do this same study once again but in one or two years' time to see how the situation has developed in this respect.

**Graphic 12. Reference to greenways in the UNESCO site Heritage information**



Source: Fundación de los Ferrocarriles Españoles. October 2019

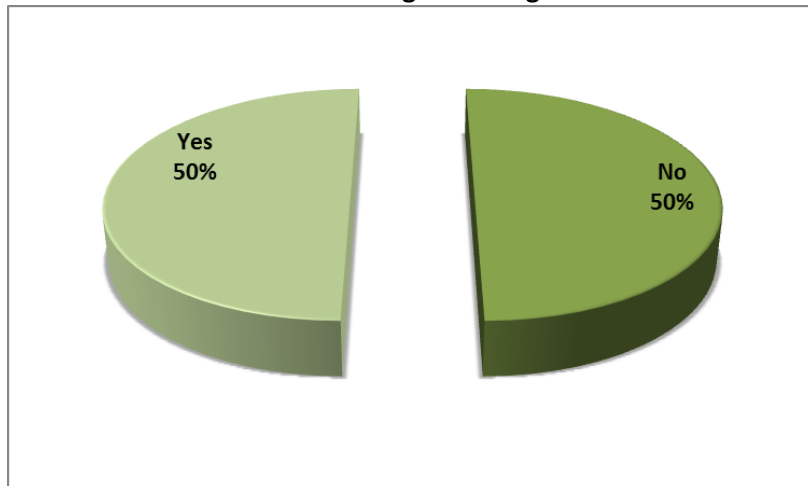
### Do you know of any tourism packages offering both resources (Greenways + UNESCO heritage) in the same product? Please describe the offers:

The result of this response is consistent with those highlighted in Graphic 9 and 10. To date, virtually the only packages offering greenways and UNESCO heritage sites together are those carried out under the Greenways Heritage project.

As explained above, half of the respondents are managers of UNESCO heritage sites from Belgium that are part of the Greenways Heritage project, and therefore they are aware of all the activities carried out in this project.



**Graphic 13. Tourism packages promoting Greenways and UNESCO Heritage sites together**



Source: Fundación de los Ferrocarriles Españoles. October 2019



## CONCLUSIONS

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**The sample (9 cases) is not considered representative. This analysis can only invite you to read trends.**

- ✦ 63% of UNESCO World Heritage sites do not have visitor eco-meters.
- ✦ As for the profile of the visitor to UNESCO heritage sites, these are domestic visitors (from the same country) who do not usually spend the night in the area where the UNESCO heritage resource is located.
- ✦ 75% of UNESCO heritage sites have a resource interpretation center.
- ✦ 75% of UNESCO heritage managers also use new technologies (augmented reality, virtual reality and 3D videos).
- ✦ With regard to accessibility, only 50% of UNESCO heritage sites managers consider that they are fully accessible to all users and tourism consumers.
- ✦ 75% of UNESCO heritage sites managers are aware of the location of a greenway in the vicinity of a heritage resource. On the other hand, 13% of respondents are unaware of this resource.
- ✦ It has been observed that 50% of UNESCO Heritage site managers are unaware or feel that there is no cooperation between them and greenways managers.
- ✦ In addition the same percentage of 50% believes that both resources are integrated in package tours jointly.
- ✦ 100% of respondents state that there is no reference to greenways in the communication about UNESCO sites.
- ✦ 100% of respondents, however, agreed that tourists to UNESCO heritage sites would be interested and very interested in getting to know and enjoy greenways.

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October 2019



The purpose of this survey is to gather quantitative information from current data, the analysis and conclusions of which will show us the current situation and allow us to take better advantage of the combination of these two resources (Greenways + UNESCO Heritage) and so move forward in the planning, management and promotion of these itineraries as common destinations.

# Analysis of the Private Sector stakeholders survey

**Greenways Heritage**

**Fundación de los Ferrocarriles Españoles**



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## INTRODUCTION

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The purpose of this survey is to gather quantitative information from current data, the analysis and conclusions of which will show us the current situation and allow us to take better advantage of the combination of these two resources (Greenways + UNESCO Heritage) and so move forward in the planning, management and promotion of these itineraries as common destinations.

The results will also be useful for promoters and managers of European greenways, and they will be shared with the managers of UNESCO Heritage sites so that they can learn more about greenway resources and promote the inclusion of UNESCO World Heritage sites in greenway-related thematic itineraries and so contribute to sustainable tourism throughout Europe.

The aim is also to gauge the current level of use of greenways in Europe, and to obtain data regarding the profile of users and aspects related to the offer, heritage, new technologies used for promotion, and aspects concerning local development and other benefits for the areas involved.

The questionnaire was designed during the month of May and the publication and launch of the survey took place in the first week of June. The survey was active until 6 October 2019 to try to obtain a greater number of answers, date when the statistical analysis of the same was started.

Google Forms has been chosen as a technological tool for creating questionnaires, but the version of the questionnaire in PDF format has also been used to be printed more easily and distributed to various meetings and gatherings.

In an effort to achieve greater impact and more responses, the questionnaires were conducted in different languages:

- **English.** See questionnaire [here>>](#)
- **Italian.** See questionnaire [here>>](#)
- **Spanish.** See questionnaire [here>>](#)

As for the structure of the questionnaire, it has been decided to divide it into the following blocks:

- **General information** – details of the company, the greenways on which it operates and the services it offers.
- **Tourism offer** – información de interés acerca del sector al que pertenece la empresa, datos sobre la ofertas turísticas en la zona en cuanto a servicios e instalaciones de carácter turístico.
- **Tourism demand** – estimation of the number of customers obtained in recent years, the profile of users travelling to greenways on which the company operates, increase in the number of tourists in the area thanks to the existence of the greenway, etc.
- **Greenways + UNESCO** – integration of the two resources in tourist packages, offers of tourist packages linking the two resources, etc.

A total of **87 responses** have been obtained.

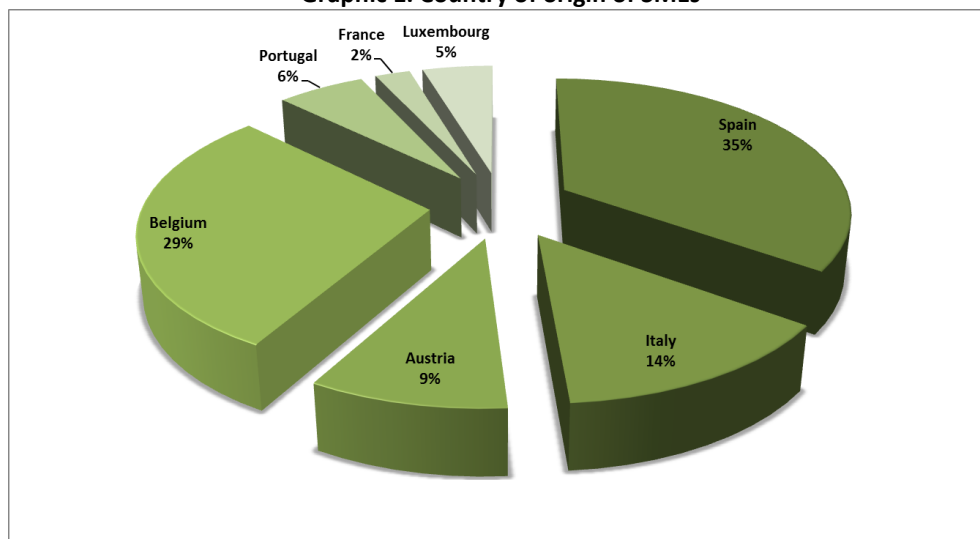
These are, in the vast majority of cases, small and medium-sized enterprises (SMEs) offering the following services:

- Accommodation – bed&breakfast, hotels, hostels, rural accommodation, rural tourist apartments.
- Restaurants and bars.
- Bike rental and transfer, bike routes.
- Travel agencies that organize nature tours, active tourism, guided hiking tours.
- Travel agencies offering packages to nature destinations, active tourism, bicycle tourism.
- Environmental education and volunteer NGOs
- Organization of events and conferences.
- Tourist Information Office – Info Point
- Visits to museums, natural spaces and protected natural spaces.

As regards the origin of the companies that have replied to the questionnaire, Graphic 1 shows that 35% of them are Spanish, followed by Belgium (29%) and Italy (14%).

There have also been responses from companies from Austria, France, Portugal and Luxembourg.

**Graphic 1. Country of origin of SMEs**



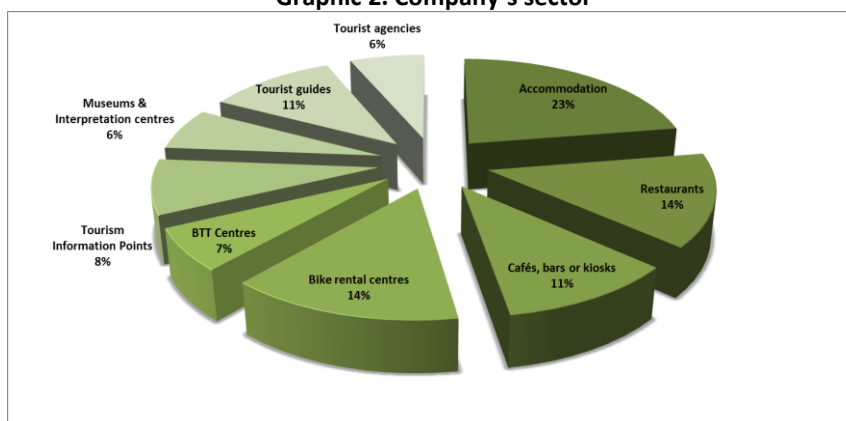
Source: Fundación de los Ferrocarriles Españoles. October 2019

## TOURISM OFFER

### Sector(s) to which your company belongs:

It is estimated that 23% of the companies that have collaborated in the development of this study belong to the sector “Accommodation”, followed by the sectors “Restaurants” and “Bike rentals”, with 14%, being a very representative sample both for the type of companies and for the geographical location.

**Graphic 2. Company's sector**

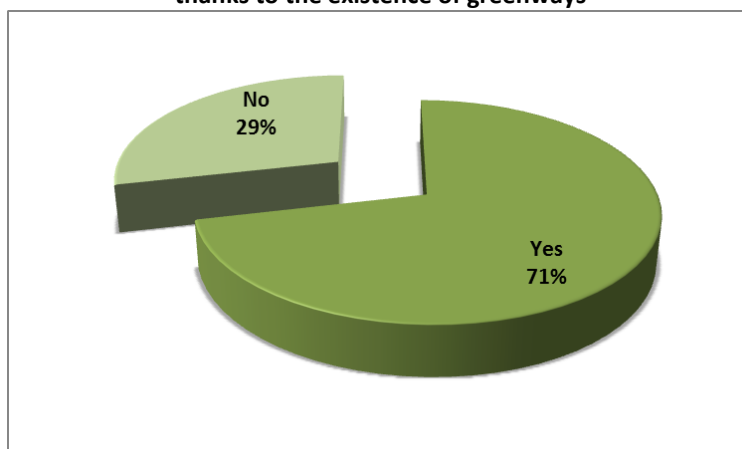


Source: Fundación de los Ferrocarriles Españoles. October 2019

### Do you think that the offer from tourism companies in your area or region has increased since the greenway has existed?

71% of the companies that replied to the questionnaire consider that the offer of tourist companies has indeed increased due to the existence of the greenway in the area. In view of this, it is important to highlight the fact that an area has a sustainable route such as the greenways, represents almost a guarantee of an increase in the offer of tourist services and facilities and, in short, of an incentive to the local economy, rural and tourist development of these territories.

**Graphic 3. Increase in the offer of tourism companies thanks to the existence of greenways**



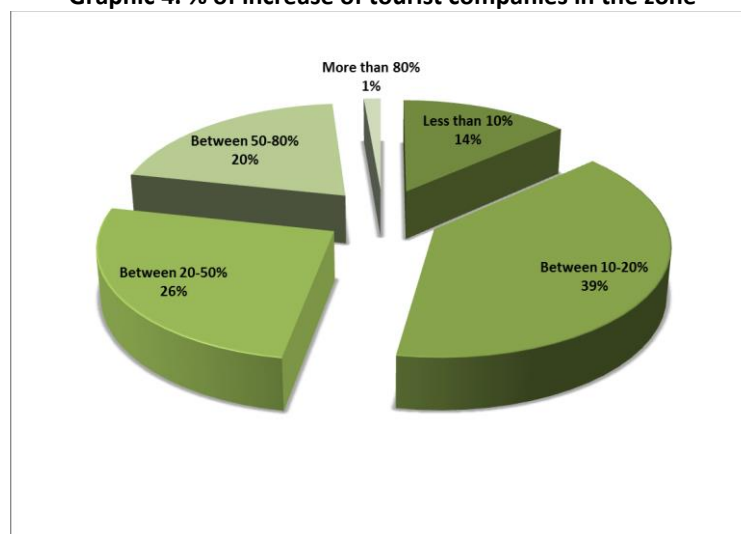
Source: Fundación de los Ferrocarriles Españoles. October 2019

### If you think it has increased, by what percentage would you estimate?

It has already been seen in the previous answer that the offer of tourism enterprises has increased since the existence of the greenways in the area. But it is also interesting to know, according to the employers who answered, how much they value the increase in the offer. Thus, 39% of respondents consider that the offer has increased by 10-20%, while 26% estimate a growth of 20-50%.

The 1% is striking, where it is claimed that tourism businesses in the area have increased by more than 80% thanks to the existence of the greenway. This is the case of the Fuso Greenway, Senda del Oso Greenway and La Camocha Greenway in Asturias, Spain.

**Graphic 4. % of increase of tourist companies in the zone**



Source: Fundación de los Ferrocarriles Españoles. October 2019

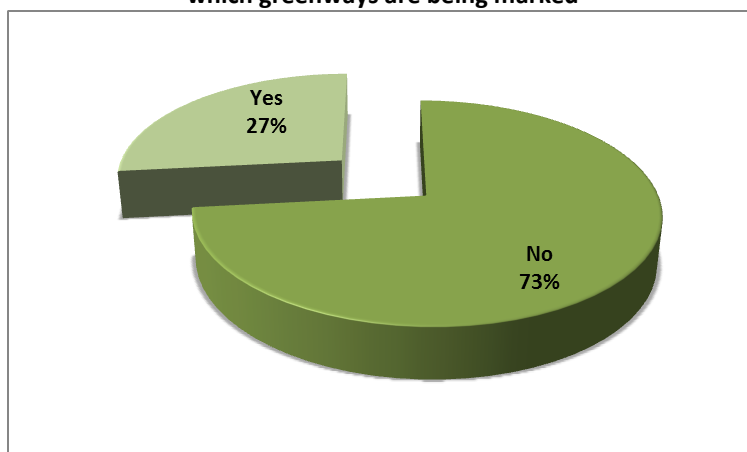
### Have you noticed the existence of tourism packages from domestic or foreign companies in which greenways are being marketed? In case you answer was yes and if you know, add the origin country of the tour operator/tourist agency.

73% of those polled did not notice the existence of tourist packages in which greenways are marketed.

The rest of 27% of the respondents do know about various tourist packages and the main countries where these offers have been marketed are: France, Germany, Holland, Belgium: countries whose culture of using sustainable means of transport such as cycling represents a daily lifestyle that is incorporated into the type of travel consumption and tourism practices.

Spain and Italy have also been mentioned, although to a lesser extent.

**Graphic 5. Existence of tourism packages in which greenways are being marked**



Source: Fundación de los Ferrocarriles Españoles. October 2019



## TOURISM DEMAND

### Clients during 2018 and 2017

The number of SMEs customers who have replied to the questionnaire varies greatly depending on the size and position of the company in the tourism market. On average between the data provided (it has to be specified that not all companies have provided this information), it turns out that, on average, the companies that have provided data usually have around 800 clients each year.

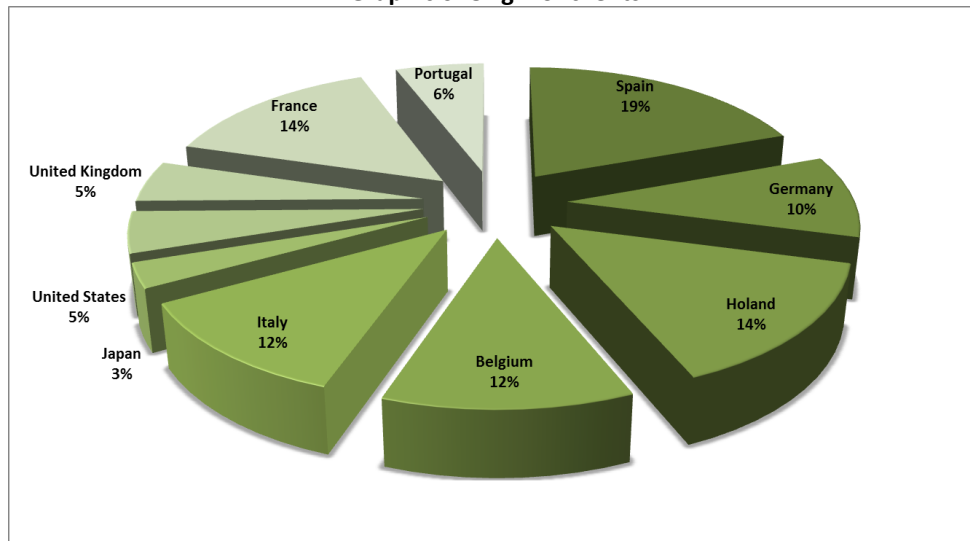
### Indicate the main countries of origin of the clients:

With regard to the SMEs customers who replied, it can be said that they come from many countries, especially Europe.

Given that 35% of the responses come from companies located in Spain, a correlation is seen with these percentages (19%). The same applies to Italy, France, the Netherlands and Belgium, which have obtained a high percentage because there have been many responses from these countries.

Although most of the clients of these companies are European, it is noted that there are customers from Japan or the United States who have contracted tourist packages created by European companies that have participated in this study.

Graphic 6. Origin of clients



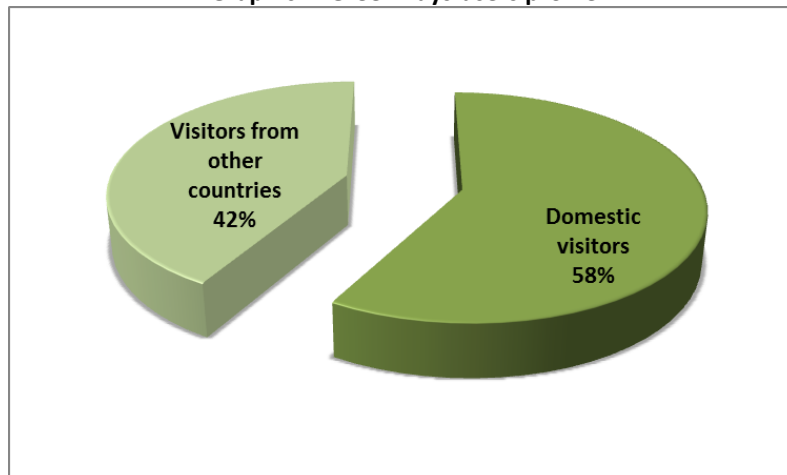
Source: Fundación de los Ferrocarriles Españoles. October 2019

### Please tell us what is - based on your criteria- the profile of Greenways users (% of domestic visitors and % of visitors from other countries):

Although the results are close, it is noted that the profile of travelers to the greenways mentioned in this study is usually of domestic tourists, that is, coming from the same country as the area through which the greenway passes, at 58%.

However, the percentage of foreign customers is seen as increasing with the passage of time and the maturation of the product "Greenway".

**Graphic 7. Greenways' users profile**

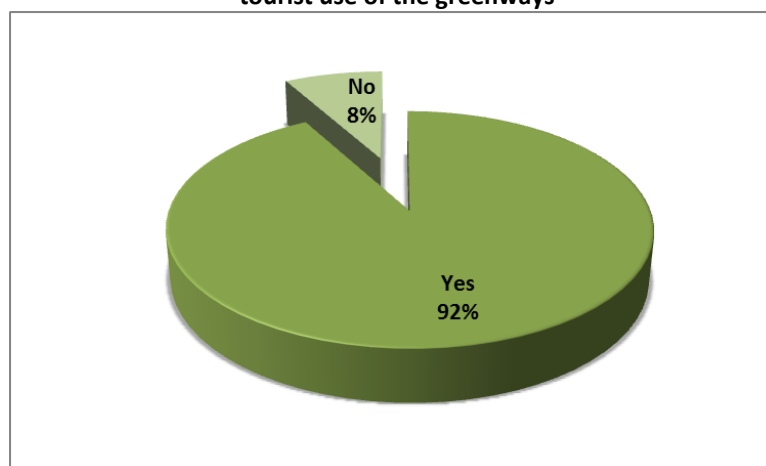


Source: Fundación de los Ferrocarriles Españoles. October 2019

#### **Have you noticed an increase in the touristic use of the Greenway in the last 3 years?**

Almost all companies consider that the greenways on which they operate have increased the tourist use in terms of the number of visitors. This result, when contrasted with the response of the greenway managers, highlights that, in fact, more and more, these infrastructures represent very attractive tourist resources for travelers, the use of which increases year after year.

**Graphic 8. Increase in the number of tourist use of the greenways**

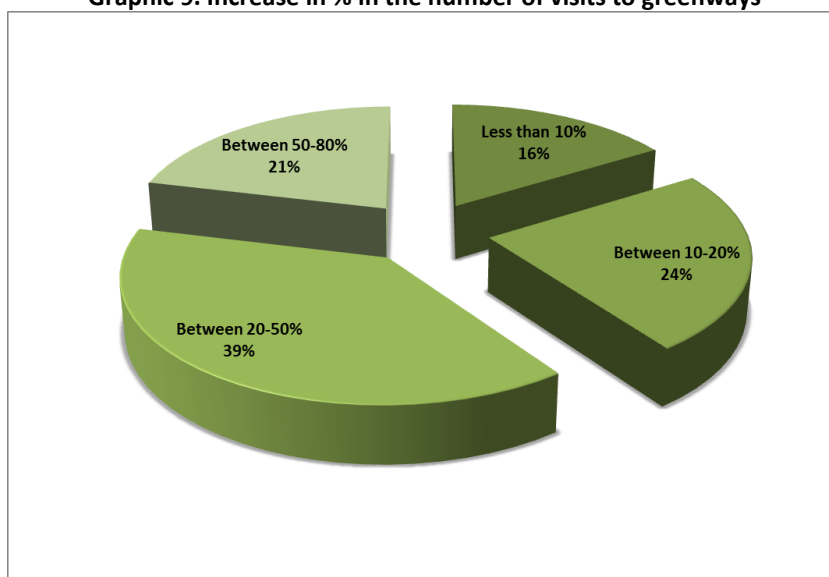


Source: Fundación de los Ferrocarriles Españoles. October 2019

#### **By what percentage would you say the number of visits to the greenway has increased in the last 3 years?**

39% of companies consider that visits have increased by 20-50%, while 21% consider that they have increased by 50-80%. This is the case of Dampfross-Drahtesel Greenway in Austria, Echternach Greenway in Luxembourg or the Guimaraes ecopista in Portugal.

**Graphic 9. Increase in % in the number of visits to greenways**

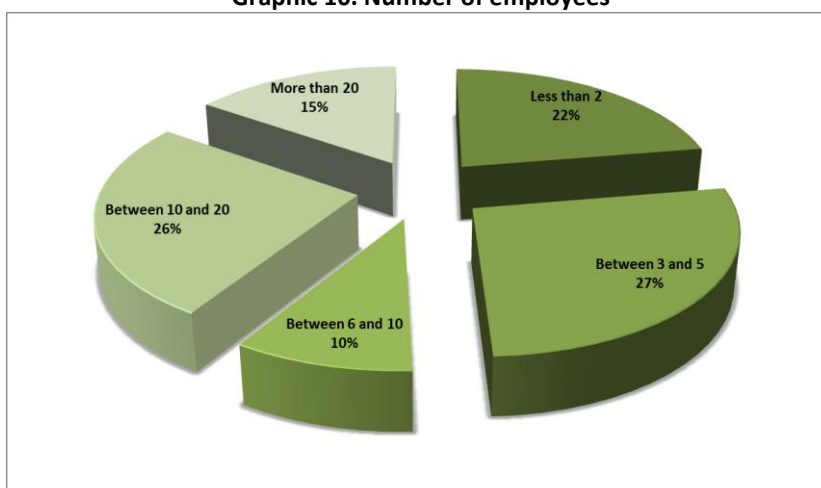


Source: Fundación de los Ferrocarriles Españoles. October 2019

### Could you tell us the number of employees in your company?

The graph shows that most of the companies that have replied have between 3 and 5 employees, followed by those that have between 10 and 20. Only 15% are represented by those with more than 20 employees.

**Graphic 10. Number of employees**



Source: Fundación de los Ferrocarriles Españoles. October 2019

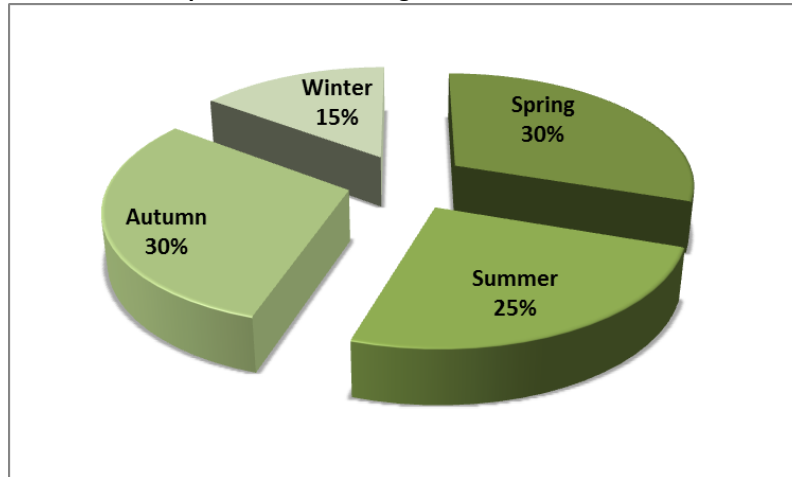
### Could you tell us which the periods of greatest influx of clients during the year are?

It is observed that at any time of the year the responding companies receive customers. However, it highlights the tendency to travel or plan trips especially during the spring and autumn months. Both seasons record 30% of the total number of responses offered.

On the other hand, it is found that companies tend to have fewer customers during the summer months and especially during the winter months.

This graph is very interesting because it clearly confirms that greenways are a seasonal product and visitors are not concentrated in the summer or holiday seasons.

**Graphic 11. Periods of greatest influx of clients**



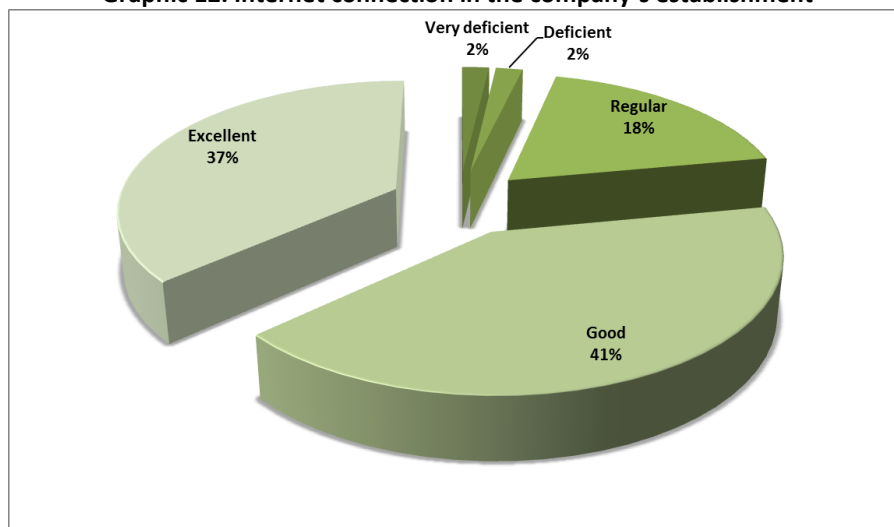
Source: Fundación de los Ferrocarriles Españoles. October 2019

#### **Could you rate the internet connection in your establishment (or in your municipality)?**

With all the technological advances of today, one of the essential requirements is currently the internet connection. On a scale of 1- very poor to 4 - excellent, 41% of respondents say they have a good connection and 37% an excellent connection.

However, attention needs to be paid to the 2% of respondents with low connectivity internet quality.

**Graphic 12. Internet connection in the company's establishment**

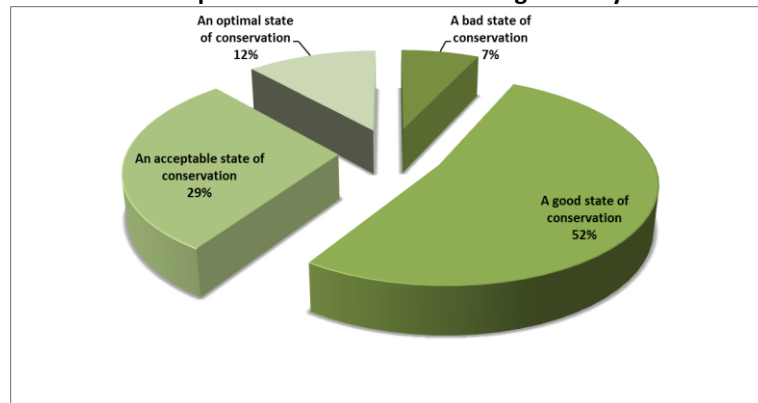


Source: Fundación de los Ferrocarriles Españoles. October 2019

### With regard to maintenance, do you consider that the greenway is in ...?

52% of respondents consider the greenway on which their company operates to be in good condition. On the other hand, 12% think that the greenway has an excellent maintenance level. However, at the opposite pole stands the 7% who affirm that the level of maintaining the greenway is in bad condition. These assessments indicate that the level of quality of the infrastructure is clearly improving.

**Graphic 13. Maintenance of the greenway**



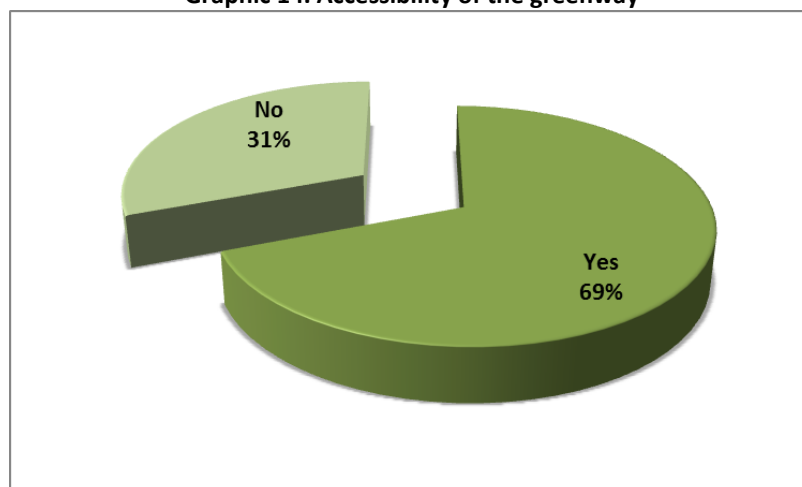
Source: Fundación de los Ferrocarriles Españoles. October 2019

### Do you consider that the greenway is accessible for everyone (including people with disabilities)?

69% of respondents say that the greenways are accessible to all types of users. Part of the answer was to be expected given that these routes are themselves linear infrastructures whose basic principle is precisely the universality of their users.

However, it is worth focusing on the fact that 31% of companies operating greenways consider that itineraries are not accessible to all, this being a high percentage considering that greenways are itineraries designed for the use of everyone.

**Graphic 14. Accessibility of the greenway**

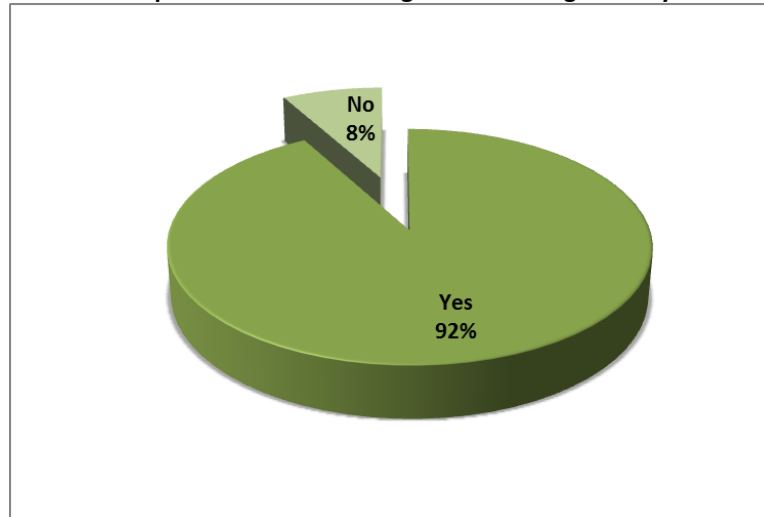


Source: Fundación de los Ferrocarriles Españoles. October 2019

### Do you think that good management of the Greenway is being carried out?

92% of respondents consider that the greenways are very well managed by their managers. Only 8% consider that itineraries should be better managed.

Graphic 15. Level of management of the greenway



Source: Fundación de los Ferrocarriles Españoles. October 2019

## GREENWAYS AND UNESCO HERITAGE SITES

### Do you think that the two resources (UNESCO Heritage and Greenway) are integrated as a tourism product?

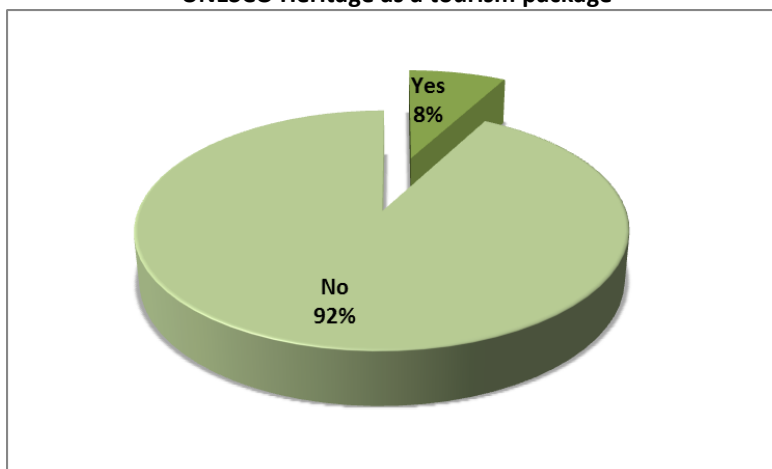
Interesting as to this question is to contrast the answers offered by the managers of greenways and UNESCO heritage as well as by the companies operating on these itineraries.

92% of the companies consider that UNESCO greenways and heritage sites are not integrated as a joint tourism product. Greenways managers point to the same results (see greenways managers analysis) at 75%. While only 50% of UNESCO Heritage sites managers point in this direction.

Although the results confirm what was perceived as a premise in this project, the statistical sample has a great influence on the responses. However and in any case, the offer of tourist products greenways and UNESCO heritage is still in an incipient state.

Hence, the 8% reading corresponds to the fact that the company TURISMO VIVENCIAL that is partner of the Greenways Heritage project has developed **15 tourism products** around the greenways and heritage UNESCO as a touristic destination as a whole.

**Graphic 16. Integration of greenways and UNESCO Heritage as a tourism package**



Source: Fundación de los Ferrocarriles Españoles. October 2019

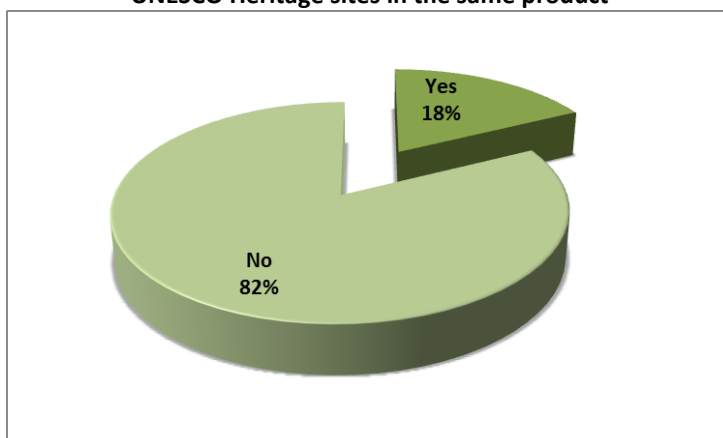
### Do you know of any tourism packages offering both resources (Greenway + UNESCO Heritage) in the same product?

The results of this question are closely linked to the previous one. 82% of respondents are unaware of the existence of a tourist package offering greenways and UNESCO heritage sites as a common destination. Only 18% of them have said yes.

A company of those who have replied positively, is in fact the travel agency Turismo Vivencial that is partner of the project Greenways Heritage and that has designed within the framework of this project **15 pilot products** promoting greenways and UNESCO heritage sites as a common destination.



**Graphic 17. Tourism packages offering greenways and UNESCO Heritage sites in the same product**

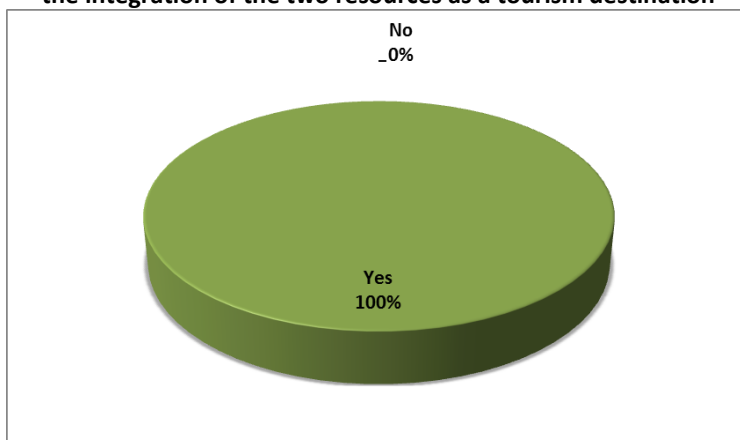


Source: Fundación de los Ferrocarriles Españoles. October 2019

**Do you think that the integration of the two resources would enhance the area as a tourism destination?**

All the companies that have replied consider in proportion to 100% that the integration of both resources would improve the territory as a tourist destination.

**Graphic 18. Improvement of the area thanks to the integration of the two resources as a tourism destination**



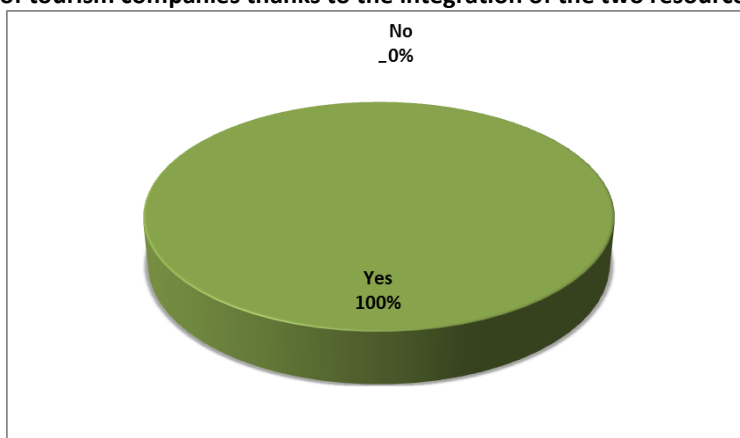
Source: Fundación de los Ferrocarriles Españoles. October 2019

**Do you think that the integration of the two resources would improve the competitiveness of tourism companies?**

In line with the above answer, 100% of those polled agree that if the two tourist resources (greenways and UNESCO heritage sites) were promoted as a tourism product it would improve the competitiveness of tourism enterprises.



**Graphic 19. Improvement of the competitiveness of tourism companies thanks to the integration of the two resources**

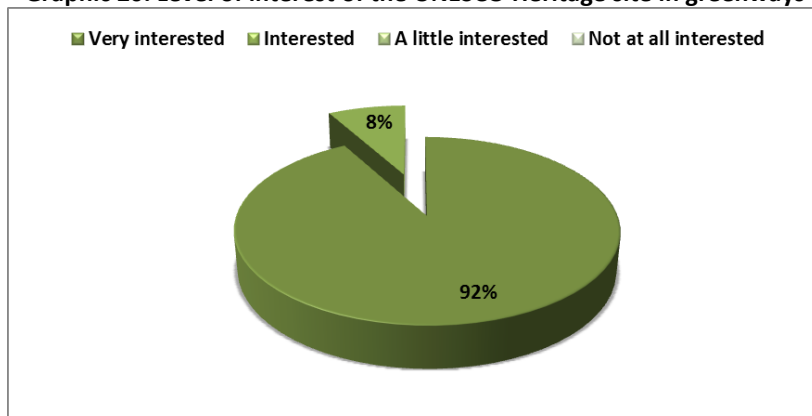


Source: Fundación de los Ferrocarriles Españoles. October 2019

**Do you think that the visitors to the UNESCO Cultural Heritage site would be interested in using your greenway?**

The graph highlights the high level of interest that tourists from UNESCO heritage sites would have in touring the greenways if they were offered or if there was better information about this binomial or joint product.

**Graphic 20. Level of interest of the UNESCO Heritage site in greenways**

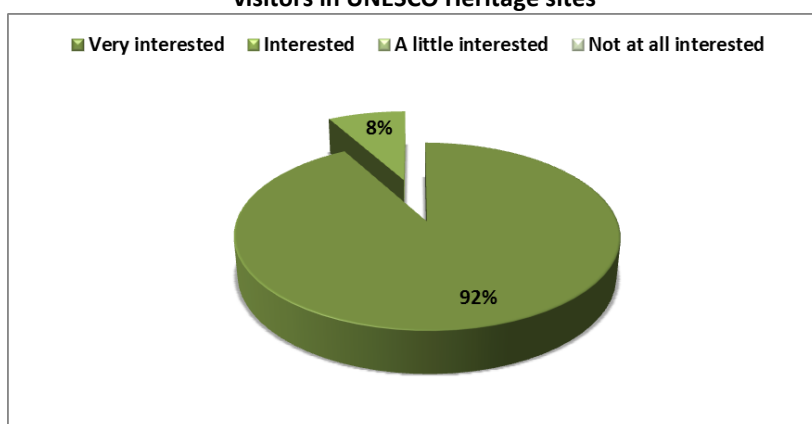


Source: Fundación de los Ferrocarriles Españoles. October 2019

**And conversely, do you think that the visitors to your greenway would be interested in visiting the UNESCO Cultural Heritage site?**

And conversely, as it was assumed, travelers who enjoy greenways would be very interested in seeing UNESCO heritage sites located in the vicinity of the routes.

**Graphic 21. Level of interest of greenways visitors in UNESCO Heritage sites**



Source: Fundación de los Ferrocarriles Españoles. October 2019

## CONCLUSIONS

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### ★ Tourism offer

- The companies that have collaborated in the development of this study have good representativity both by type of company and geographical location.
- 71% of the firms that replied to the questionnaire consider that the offer of tourism companies has indeed increased thanks to the existence of the greenway in the area.
- Those who answered in the affirmative consider that, for the most part, offer has increased by 10-20 % in recent years.
- 73% of respondents have not noticed the existence of tourist packages in which greenways are marketed.

### ★ Tourism demand

- On average, companies that have replied usually have around 800 clients per year.
- Most of the clients of these companies are European, however, it is noted that there are also customers from Japan or the United States who have contracted tourist packages created by European companies.
- The travelers who usually travel along greenways are domestic travelers, that is, from the same country as the area in which the itineraries run.
- Almost all companies (92%) consider that the greenways they operate have increased the tourist use in terms of the number of visitors.
- The 27% of the companies that have answered have between 3 and 5 workers. In second place are those that have between 10 and 20 workers.
- It is observed that at any time of the year companies receive customers but usually receive more customers during the spring and autumn months: the greenways as a seasonal resource.
- Most companies have good and very good internet connection in their establishments.
- 52% of respondents consider the greenway in which their company operates to be in good condition and 69% consider that the greenways are accessible to all types of users. Therefore, 92% also consider that these infrastructures are well managed.



#### ✿ **Greenways + UNESCO Heritage sites**

- The companies operating greenways agree that the greenways and UNESCO heritage sites are not integrated into a tourism product and 82% of the companies surveyed are unaware of the existence of any package that offers these resources jointly.
- 100% of companies point to the fact that a possible integration of both products would benefit the territory as a tourist destination.
- In addition, they also unanimously consider that the integration of resources would increase the competitiveness of tourism enterprises.
- It is estimated that more than 90% of those travelling to greenway destinations would be very interested in seeing UNESCO heritage sites and vice versa.

Fundación de los Ferrocarriles Españoles

October 2019



*Project partner responsible:*

Fundación de los Ferrocarriles Españoles



## Greenways **HERITAGE**

Lead partner/coordinator:

European Greenways Association (EGWA)

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Provincie Antwerp (Belgium)

Turismo Vivencial (Spain)

Stad Mechelen (Belgium)

Comunidade Intermunicipal do AVE (Portugal)



ASSOCIATION EUROPÉENNE DES VOIES VERTES  
EUROPEAN GREENWAYS ASSOCIATION  
ASOCIACIÓN EUROPEA DE VÍAS VERDES



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